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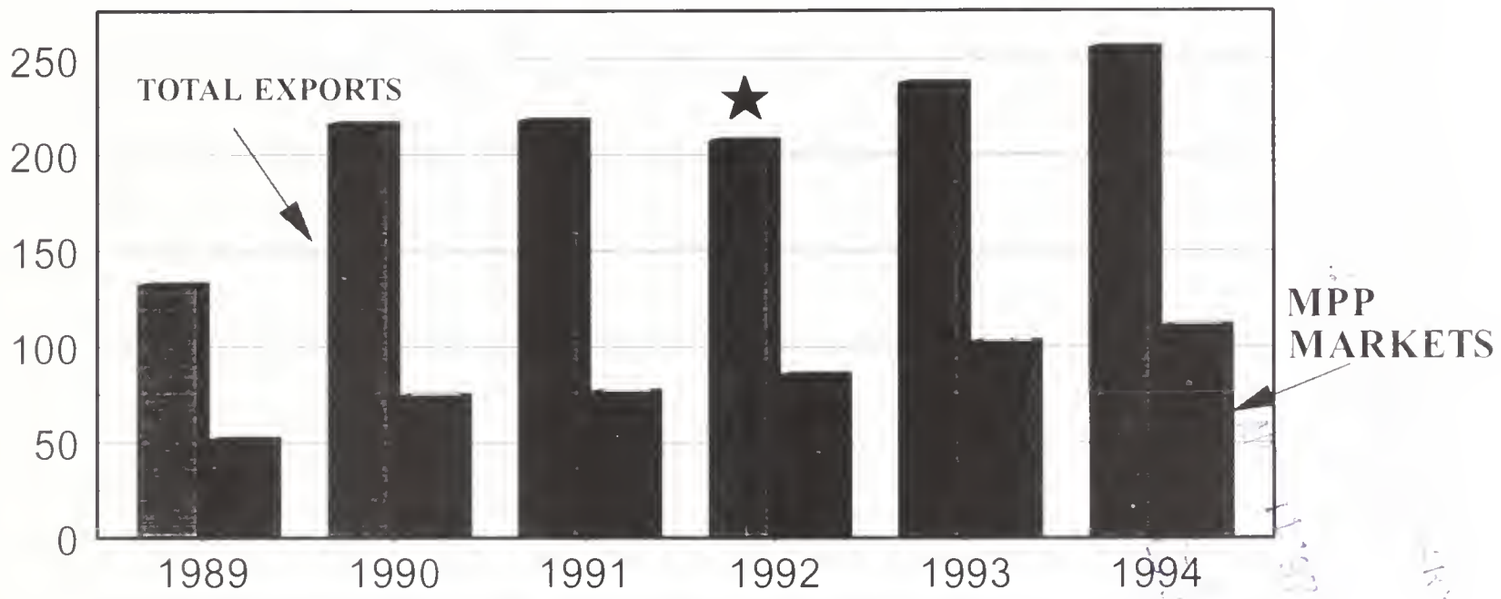
World Horticultural Trade & U.S. Export Opportunities

U. S. TABLE GRAPE EXPORTS RISE AS SHIPMENTS TO MPP TARGET MARKETS INCREASE

Million $



Source U S Census data for calendar years

★ Shipments fell due to low supply availability that season

U.S. table grape exports have continued to rise over the past several years, reaching almost $256 million in calendar year 1994. An increasingly important component of this growth has been shipments to markets targeted in the Market Promotion Program (MPP). Among the countries targeted with MPP funds are Hong Kong, Taiwan, Japan, Korea, Philippines, Singapore, New Zealand, Malaysia, Indonesia, Thailand, Mexico, Costa Rica, Panama, Guatemala, Venezuela, Brazil, and the United Kingdom. For calendar year 1994, exports to the 17 targeted markets accounted for slightly over 43 percent of total export value. Great strides have been made in North Asia and Southeast Asia, where continued brisk economic growth has raised discretionary incomes and demand for commodities such as table grapes. Progress in removing non-tariff trade barriers and lowering import duties will likely improve export prospects in Asia and throughout the world. **(For details on the table grape situation, see page 10)**

Approved by the World Agricultural Outlook Board - USDA

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ANALYSIS

Casey Bean	202-720-4620	Fresh deciduous fruit, apple juice, olives, and Asia-specific issues
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, tropical fruits
Ross Kreamer	202-720-9903	Canned deciduous fruit, wine, table grapes, kiwifruit, NAFTA, PL-480, and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, bananas, avocados, nursery products, and cut flowers
Samuel Rosa	202-720-9792	Sugar, fresh citrus and juices, honey, mushrooms, and CBI
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, FAO citrus liaison, and berries
Mark Thompson	202-720-6877	Dried fruit and cross-commodity issues

MARKETING

Laura Davis	202-720-2252	Deciduous fruit
Ted Goldammer	202-720-8498	Wine, brandy, and potatoes
Stacey Peckins	202-690-1341	Nursery products, avocados, tree nuts, papaya, and canned tomatoes
Elise Pinkow	202-690-1341	Table grapes, grape juice, and berries
Steve Shnitzler	202-720-8495	Dried fruit, kiwifruit, ginseng, asparagus, tart cherries, and processed corn
Robert B. Tisch	202-720-0898	Citrus

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Export Summary

U.S. exports of horticultural products to all countries in January 1995 totaled $643.0 million, 11 percent above the same month a year earlier. Categories with the most significant increases in January were fresh vegetables (up $25 million or 34 percent); fresh citrus (up $11.5 million or 18 percent); fruit and vegetable juices (up $10.4 million or 33 percent); hops (up $7.4 million or 70 percent); and beer (up $15.0 million or 94 percent). Categories with the sharpest decreases were tree nuts (down $18.3 million or 20 percent) and fresh deciduous fruit, primarily apples (down $7.9 million or 11 percent). Mexico accounted for the decrease in U.S. apple exports due to the impact of the recent peso devaluation. During the first four months (October-January) of fiscal 1995, the total value of U.S. horticultural exports was $3.2 billion -- 21 percent over the same period last year.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
JAN 95

NAME	QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS MT										
GRAPEFRUIT	57,669	78,678	154,913	190,069	461,577	26,628	37,951	78,624	93,043	228,387
LEMONS	13,429	11,200	49,346	42,220	124,410	8,112	9,011	42,378	38,516	108,711
ORANGES, INCL TMPLS	49,678	45,341	125,446	138,365	543,324	25,486	23,903	71,529	73,963	291,021
OTHER CITRUS	3,247	3,634	10,117	12,283	26,339	2,548	3,404	9,010	10,908	20,325
Subtotal:----	124,025	138,854	339,823	382,938	1,155,652	62,774	74,270	201,541	216,431	648,447
FR, FRT, NON-CIT MT										
APPLES	77,771	65,983	268,648	313,595	662,897	48,388	41,138	165,134	185,919	404,229
AVOCADOS	391	1,396	1,996	3,724	8,923	405	1,073	1,971	3,091	11,337
CHERRIES SWT & TRT	38	124	146	518	30,641	63	103	297	529	130,864
GRAPES	3,344	1,675	90,303	91,979	215,510	3,771	2,302	102,800	112,808	244,148
KIWIFRUIT	1,406	1,198	3,382	3,766	8,748	2,017	1,738	4,882	4,975	13,091
MELONS	3,868	2,761	20,304	21,875	218,603	2,673	1,965	11,563	11,413	82,265
PAPAYA	582	559	2,546	3,056	7,759	1,116	1,276	4,845	5,760	14,547
PEACHES & NCTRNS	493	527	2,013	3,328	83,306	617	594	1,890	2,655	65,914
PEARS	10,049	12,424	59,773	75,982	137,040	5,535	6,647	33,261	39,029	74,043
PLUMS/PRUNES	221	377	2,823	4,064	69,918	333	640	2,450	3,793	56,882
STRAWBERRIES	1,223	589	6,557	6,151	57,107	2,699	1,487	17,357	17,567	94,942
OTHER NON-CITRUS	1,029	1,764	17,461	14,471	55,521	941	1,741	15,586	15,951	60,348
Subtotal:----	100,421	89,382	475,959	542,513	1,555,979	68,564	60,708	362,042	403,495	1,252,616
CND/PREP FRUIT MT										
CHERRIES TRT CND	288	405	1,696	2,008	5,656	476	728	3,022	3,484	10,117
FRUIT MIXTURES	1,762	2,373	9,192	11,154	26,348	1,989	2,766	10,817	12,843	30,536
MARACHINO CHRY	232	241	1,705	1,756	4,685	452	527	3,311	3,727	9,003
PEACHES CANNED	1,221	1,153	6,126	5,499	18,173	1,130	1,076	5,742	4,984	17,798
PINEAPPLE CANNED	93	97	1,522	1,149	4,156	121	86	1,369	967	3,659
FRT PREP/PRES	3,908	7,174	20,450	25,283	64,995	4,515	6,154	23,761	27,397	74,638
OTHER CANNED FR	2,865	4,292	9,494	11,499	43,183	2,308	3,266	8,918	10,933	38,088
Subtotal:----	10,372	15,738	50,187	58,351	167,199	10,993	14,605	56,944	64,337	183,843
DRIED FRUIT MT										
PRUNES, DRIED	4,693	4,580	22,522	22,000	57,923	10,103	10,913	50,144	51,772	137,199
RAISINS, DRIED	10,046	8,499	42,793	41,297	122,625	15,419	13,551	66,497	67,211	195,347
OTHER DRIED FRUIT	1,540	1,806	8,145	10,084	20,739	3,272	3,616	21,107	23,188	51,362
Subtotal:----	16,280	14,886	73,460	73,382	201,288	28,795	28,082	137,750	142,172	383,909
FROZEN FRUIT MT										
BLUEBERRIES, FZN	441	689	1,583	1,949	7,104	671	968	2,465	2,827	10,616
STRAWBERRIES, FZN	1,794	2,131	6,759	8,487	27,248	2,280	2,729	8,874	10,871	34,765
OTHER FZN FRUIT	874	1,265	3,721	4,453	15,317	1,258	1,908	6,059	6,898	23,995
Subtotal:----	3,110	4,086	12,064	14,889	49,670	4,211	5,605	17,399	20,597	69,377
FRT&VEG JUICE (SSE) KL										
GRAPEFRUIT JU CNC	892	2,634	6,307	14,632	37,622	1,100	1,718	5,161	9,779	33,808
ORANGE JU NT CNC	7,455	14,827	34,441	53,816	127,494	5,047	9,342	23,644	35,155	84,553
ORANGE JUICE CNC	14,563	22,220	64,775	74,555	268,785	9,270	10,966	39,551	41,665	149,035
OTHER JUICES	23,146	25,487	102,559	118,270	362,485	15,916	19,784	67,369	86,157	248,341
Subtotal:----	46,057	65,171	208,084	261,275	796,387	31,334	41,812	135,727	172,757	515,738
VEGETABLES FR MT										
ASPARAGUS, FR, CHLD	900	1,217	1,381	1,735	21,980	4,040	5,116	5,323	6,796	71,547
BROCCOLI	14,897	14,923	42,181	36,307	128,764	9,001	8,587	25,992	30,016	80,197
CAULIFLOWER	9,282	10,158	31,353	33,862	94,794	5,826	6,755	20,452	25,135	61,798
CELERY	11,884	11,258	42,996	41,395	117,643	4,142	6,870	14,784	20,864	37,955
LETTUCE, FR, CH.	28,828	30,861	115,537	107,829	309,932	10,341	17,823	45,089	72,813	126,426
ONIONS, FR	7,369	34,831	46,164	175,698	193,828	4,427	12,645	19,964	55,358	69,757
PEPPERS	3,178	3,050	17,488	17,987	52,747	2,666	3,421	15,270	17,917	44,884
TOMATOES, FR, CH.	10,112	8,759	46,498	51,189	148,517	13,424	9,562	45,166	46,933	114,143
OTHER VEG, FR.	37,596	46,980	154,636	199,583	686,139	23,947	31,318	109,414	128,034	361,952
Subtotal:----	124,050	162,042	498,238	665,590	1,754,349	77,818	102,102	301,460	403,869	968,665
VEGETABLES CANNED MT										
CATSUP & CHILI SA	2,030	3,378	7,719	14,939	31,335	1,857	2,548	6,915	10,551	24,793
SWEET CORN CANNED	14,647	11,856	60,109	56,233	150,029	10,956	9,817	47,592	47,929	121,698
TOMATO PASTE	5,560	8,700	27,955	33,025	76,150	4,368	7,062	23,261	26,554	63,088
TOMATO SAUCE	5,143	5,982	25,020	28,192	80,996	5,439	5,921	25,694	26,898	79,832
OTHER CANNED VEG.	13,652	16,123	70,475	73,425	206,930	16,895	19,128	89,163	89,633	249,921
Subtotal:----	41,036	46,041	191,280	205,817	545,443	39,517	44,478	192,628	201,567	539,334
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	19,880	21,613	78,044	103,584	246,544	14,394	15,741	55,224	77,419	178,026
FZN SWT CORN	4,444	5,183	23,086	25,880	62,340	3,999	4,499	20,330	23,044	55,228
OTHER POT. FZN	1,782	1,972	7,647	6,975	19,930	1,551	1,240	6,309	5,556	15,985
OTHER FZN VEG	3,838	5,523	18,242	22,982	55,286	3,477	4,811	17,144	20,544	53,023
Subtotal:----	29,945	34,292	127,020	159,423	384,101	23,423	26,293	99,008	126,564	302,264
DEHYD VEGETABLES MT										
GARLIC DEHY	672	400	2,535	2,634	8,031	1,586	974	6,114	6,284	19,224
ONIONS DEHY	2,163	2,040	8,884	14,104	28,721	4,769	4,673	19,766	24,956	61,580
POTATO DEHYD	3,122	4,241	13,023	15,816	41,546	3,263	4,262	13,506	16,370	43,252
OTHER DEHY VEG.	2,334	2,737	8,425	17,182	29,725	4,583	5,225	18,326	26,655	57,923
Subtotal:----	8,292	9,419	32,869	49,738	108,024	14,202	15,136	57,713	74,266	181,980
TREE NUTS MT										
ALMND SH/PREP	13,675	14,100	65,403	83,094	166,886	62,581	47,081	299,828	268,032	729,695
ALMONDS, UNSHLD	726	1,651	5,257	7,620	15,261	1,965	4,126	13,864	19,491	40,108
PISTACHIO, UNSHLD	736	911	3,701	5,883	10,469	2,083	2,360	10,861	15,787	29,952
WALNUTS, SHLD	1,770	1,395	11,402	11,679	20,192	5,882	3,840	37,223	29,790	71,786
WALNUTS, UNSHLD	1,486	973	37,735	46,005	45,510	2,659	1,866	72,453	74,306	85,496
OTHER NUTS	4,792	4,490	27,123	27,202	58,684	14,951	12,797	78,037	69,276	172,087
Subtotal:----	23,188	23,522	150,624	181,485	317,005	90,123	72,073	512,269	476,684	1,129,127
NURSERY PRODUCTS NONE										
CUT FLOWERS	0	0	0	0	0	2,920	2,359	12,247	11,012	38,587
OTHER NURSERY	0	0	0	0	0	11,070	12,163	46,503	54,396	153,273
Subtotal:----	0	0	0	0	0	13,990	14,523	58,751	65,408	191,860
HOPS & PRODUCTS MT										
HOP EXTRACT	708	525	2,094	1,695	5,400	7,246	7,306	28,082	29,971	62,297
HOP PELLETS	297	1,325	1,190	3,580	4,162	1,741	7,644	7,232	21,165	23,218
HOPS, NSFP	326	473	908	1,639	1,976	1,655	3,093	5,230	9,882	11,412
Subtotal:----	1,332	2,324	4,192	6,916	11,539	10,644	18,044	40,546	61,019	96,929
WINE KL										
GRAPE WINES	7,014	7,229	34,688	35,967	116,815	10,862	11,180	52,255	57,392	172,684
OTHER WINE PRODUCTS	495	928	4,820	4,692	13,398	588	1,103	3,678	4,922	13,847
Subtotal:----	7,510	8,158	39,509	40,660	130,213	11,451	12,284	55,933	62,314	186,531
MISCELLANEOUS KL										
BEER & BEVERAGES	25,767	30,942	115,629	231,298	598,932	16,043	31,057	69,012	138,436	373,685
EDIBLE PREPARATIONS	11,574	13,647	47,133	69,296	160,298	40,623	49,368	164,373	360,620	571,798
GINSENG	61	23	561	668	933	5,563	2,478	51,958	47,400	77,148
POTATO CHIPS	4,896	4,548	19,071	28,171	60,907	11,947	10,945	52,578	76,946	174,576
OTHER MISC.	0	0	0	0	0	19,885	19,163	74,771	87,253	250,246
Subtotal:----	42,299	69,161	182,396	329,434	821,071	94,062	113,013	412,694	710,658	1,447,455
Grand Total:						581,907	643,035	2,642,411	3,202,146	8,098,083

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
JAN 95

NAME		QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		2,318	3,466	14,402	25,333	106,059	1,477	1,821	6,714	8,667	76,188
AVOCADO		940	1,342	6,390	16,513	14,211	467	513	3,836	16,434	12,538
BANANA		285,091	315,031	1,151,244	1,231,888	3,643,279	74,515	87,384	308,796	334,501	983,322
CANTELOUPE		29,213	23,397	64,589	71,574	224,836	8,582	6,046	19,854	19,859	67,706
GRAPE		55,041	51,839	69,882	79,613	311,027	45,226	42,172	58,635	68,852	251,625
KIWIFRUIT		112	0	1,351	379	29,335	124	0	1,296	287	17,612
MANGO		1,524	3,330	4,887	8,536	121,250	1,705	3,063	6,270	8,989	93,477
PEACH		19,062	18,618	25,637	26,664	43,118	12,000	11,944	16,177	17,191	27,816
PEAR		1,105	607	2,720	1,592	65,283	445	213	4,694	3,422	33,073
PINEAPPLE		9,016	10,106	36,330	38,776	126,505	3,335	3,428	12,956	12,360	40,775
STRAWBERRY		1,587	1,714	3,661	3,530	20,102	3,840	3,682	8,110	7,218	35,038
OTHER MELON		14,978	12,707	40,251	39,056	114,972	5,266	4,426	14,901	12,588	41,629
OTHER FRUIT		46,018	53,204	163,113	207,131	547,710	23,882	21,042	79,556	87,616	243,414
Subtotal:----		466,010	495,367	1,584,464	1,750,590	5,367,691	180,868	185,740	541,799	597,989	1,924,220
DRIED FRUIT	MT										
DRD APRICOT		835	1,467	3,816	6,075	10,400	2,139	2,325	9,632	9,271	23,920
DRD FIG & PASTE		1,206	1,229	4,341	5,080	11,732	1,350	1,230	5,954	6,514	15,131
OTHER DRD FRUIT		2,719	1,492	9,528	8,466	27,141	4,102	2,215	14,046	12,448	40,093
Subtotal:----		4,761	4,189	17,686	19,622	49,274	7,592	5,771	29,633	28,235	79,145
FROZEN FRUIT	MT										
FZN BLUEBERRIES		541	778	1,814	3,138	8,242	785	1,185	2,624	4,344	11,967
FZN STR		728	2,618	1,838	3,999	18,949	976	2,897	2,537	4,590	19,766
OTHER FZN FRUIT		1,804	2,361	9,613	8,510	34,646	2,206	2,977	10,012	10,004	40,152
Subtotal:----		3,074	5,758	13,267	15,648	61,838	3,968	7,060	15,174	18,940	71,887
CANNED/PREP FRUIT	MT										
CANNED OLIVES		4,800	5,141	25,317	20,725	70,223	10,386	13,128	52,233	50,414	152,061
CANNED ORANGES		2,943	2,982	12,244	12,808	52,281	2,336	2,657	10,007	10,342	41,356
CANNED PEACH		2,317	2,540	10,874	8,637	22,584	1,327	1,431	5,958	4,927	12,665
CANNED PINEAPPLE		33,018	28,231	105,628	103,522	330,958	19,612	13,834	60,349	49,925	178,064
MIXED FRUIT		6,773	5,709	17,026	15,748	36,254	5,622	3,824	14,514	11,476	30,687
PREP/PRES FRUIT		4,031	4,811	19,069	20,479	60,832	4,634	6,051	21,135	24,559	67,856
OTHER CANNED FRUIT		4,380	4,971	18,505	18,287	56,995	5,823	6,899	24,216	24,340	72,954
Subtotal:----		58,265	54,388	208,667	200,208	630,131	49,742	47,828	188,415	175,988	555,644
FRT&VEG JUICE (SSE)	KL										
APPLE JUICE		79,398	58,734	308,344	294,958	1,018,486	15,303	15,103	61,895	65,605	184,639
FCOJ		97,426	98,101	612,096	472,969	1,592,083	19,411	20,549	120,623	86,571	311,967
GRAPE JU		3,588	5,543	23,354	20,327	71,848	1,543	1,960	7,722	7,230	27,588
PINAP JU		33,650	32,712	104,580	93,057	287,725	8,150	6,124	23,847	17,788	61,809
OTHER FRUIT JUICES		28,078	17,175	71,298	71,528	230,804	10,030	6,244	33,759	39,318	103,032
Subtotal:----		242,142	212,267	1,119,674	952,841	3,200,947	54,440	49,981	247,848	216,513	689,037
FRESH VEGETABLES	MT										
GARLIC		1,676	1,890	12,593	3,429	31,117	1,337	2,623	6,616	4,677	24,827
ASPARAGUS		3,102	4,214	10,036	12,837	27,711	5,390	8,317	14,493	20,664	41,829
BELL PEPPER		21,064	23,280	44,796	43,767	121,842	19,173	29,224	49,295	62,606	142,760
CARROTS		6,061	13,054	32,918	51,883	60,094	1,427	4,076	7,647	14,105	15,433
CHILI PEPPER		4,604	7,725	11,307	19,026	43,897	5,540	9,934	14,955	22,852	43,110
CUCUMBER		49,368	42,774	108,622	100,131	250,972	23,201	29,371	49,408	59,073	106,902
ONIONS		23,360	22,425	64,405	53,415	254,652	16,573	18,005	40,088	47,466	136,642
POTATO, INCL SD		31,949	20,100	111,725	74,141	317,308	7,023	3,900	24,001	14,893	70,644
SQUASH		18,488	18,996	45,863	48,957	101,869	10,778	16,821	25,549	38,675	58,123
TOMATOES		50,159	66,359	113,654	123,953	401,875	62,120	55,416	99,889	108,964	328,154
OTHER FRESH VEGETAB		32,390	40,451	94,082	120,812	281,345	21,099	31,475	58,212	81,755	164,712
Subtotal:----		242,226	261,273	650,007	652,357	1,892,688	173,666	209,168	390,158	475,735	1,133,140
CANNED/DEHYD VEGET	MT										
CND ARTICHOKE		1,068	956	2,916	3,669	30,548	1,732	1,676	4,684	6,917	53,543
CANNED BAMBOO		2,616	3,054	12,844	11,369	29,691	2,171	2,369	9,897	8,696	23,548
CND MSHROOMS		3,366	5,468	14,188	17,737	64,543	6,707	13,077	29,776	44,853	132,677
CND PIMIENTO		505	714	2,524	3,379	6,649	597	1,059	3,008	4,822	8,273
CND TOM		3,290	7,185	13,563	17,539	45,118	1,108	2,649	4,659	6,265	16,746
CANNED WATERCHESTNU		1,373	1,227	6,926	6,817	39,849	1,163	919	5,345	5,542	27,363
TOMATO PASTE & SAUC		2,060	3,639	6,307	13,128	61,941	1,230	3,038	3,813	10,008	43,217
DRIED MUSHROOMS		154	231	471	748	1,554	1,816	2,387	5,885	7,923	16,994
DRIED TOMATOES		666	425	2,756	1,821	5,957	2,351	1,466	10,130	6,775	22,770
OTHER DEHYD VEGETAB		7,507	11,338	34,179	35,216	90,749	5,228	6,791	21,115	23,753	60,302
OTHER CANNED VEGETA		16,311	21,141	65,825	81,461	207,565	15,788	20,788	69,065	83,760	211,430
Subtotal:----		38,922	55,384	162,504	192,886	584,168	39,894	56,223	167,381	209,320	616,866
FROZEN VEGETABLES	MT										
BROCCOLI FZN		11,632	15,511	39,016	54,520	130,634	7,798	9,854	26,892	34,372	87,418
CAULIFLOWER FZN		6,019	3,750	19,904	17,854	29,523	5,589	2,563	17,509	11,008	24,636
POTATO FZN		10,673	11,935	41,970	53,470	130,215	5,895	6,999	23,221	30,836	72,129
OTHER VEG FZN		198,818	154,295	469,967	839,672	2,582,515	9,428	9,755	31,629	34,538	105,616
Subtotal:----		227,144	185,493	570,858	965,517	2,872,889	28,712	29,172	99,252	110,755	289,800
TREE NUTS	MT										
BRAZILS TOT		383	427	2,681	2,672	11,720	780	1,039	5,821	6,496	19,757
CASHEWS TOT		5,618	4,761	21,871	19,081	64,366	23,847	20,925	90,500	83,590	280,857
COCONUT		5,737	4,114	24,760	18,779	68,463	4,417	3,325	19,791	15,055	56,557
PECANS		1,927	4,286	4,343	18,912	13,178	2,931	10,383	12,221	43,400	32,545
OTHER NUTS		1,166	1,335	9,148	9,806	17,689	4,391	5,678	31,055	36,724	64,870
Subtotal:----		14,834	14,925	62,806	69,252	175,419	36,368	41,351	159,390	185,267	454,587
NURSERY PRODUCTS	M										
CARNATIONS		112,862	109,114	373,127	396,705	1,057,314	8,484	9,358	31,235	33,924	88,833
CHRISTMAS TREES		0	0	1,986	2,012	2,029	0	0	17,041	17,250	17,116
CHRYSANTHEMUMS		58,384	55,248	168,582	206,561	562,356	6,243	5,655	25,098	22,435	66,608
ROSES		64,925	69,887	203,482	208,442	677,762	11,887	12,531	34,035	36,139	124,203
TULIP BULBS		0	18	64,784	77,694	302,490	0	2	7,804	9,487	34,441
OTHER CUT FLOWERS		0	0	0	0	0	10,102	12,151	37,730	43,940	122,628
OTHER NURSERY PRODU		0	0	0	0	0	20,076	24,282	79,914	93,072	226,569
Subtotal:----		236,173	234,267	811,963	891,416	2,601,952	56,794	63,982	232,860	256,251	680,401
HOPS & PRODUCTS	MT										
HOPS & PELLETS		1,337	2,178	2,707	3,255	5,291	9,195	14,831	16,954	21,463	33,104
OTHER HOP PRODS		110	150	247	276	703	644	885	1,563	1,679	4,251
Subtotal:----		1,447	2,328	2,955	3,532	5,995	9,840	15,717	18,518	23,142	37,356
WINE	KL										
RED WINE		7,050	8,522	38,212	43,059	113,743	23,304	29,592	134,776	155,569	386,908
SPARKLING WINE		1,283	1,243	15,999	14,867	31,087	9,924	9,830	130,017	123,483	276,616
WHITE WINE		6,288	6,406	34,663	34,039	100,106	17,505	19,069	103,106	109,015	293,701
OTHER WINE PRODUCTS		0	0	0	0	0	4,638	5,306	25,700	28,024	72,239
Subtotal:----		14,622	16,172	88,874	91,966	244,937	55,373	63,798	393,600	416,092	1,029,466
MISCELLANEOUS	KL										
BEER & BEVERAGES		75,669	80,134	372,450	385,766	1,320,904	60,161	64,438	305,049	323,398	1,083,435
OTHER MISC.		0	0	0	0	0	59,029	65,009	259,306	274,296	779,176
Subtotal:----		75,669	80,134	372,450	385,766	1,320,904	119,191	129,448	564,356	597,694	1,862,611
Grand Total:							816,455	905,246	3,048,389	3,311,928	9,424,165

EXPORT NEWS AND OPPORTUNITIES

Canada extends bulk easement for U.S. potatoes.

Following extensive discussions between U.S. and Canadian authorities, Agriculture Canada (AgCanada) has agreed to extend its easement for bulk import of U.S. fresh potatoes to Prince Edward Island (PEI) until April 21. PEI's Potato Board had previously opposed an extension due to concern about late blight. AgCanada has concurred with APHIS that late blight does not pose a problem. The U.S. Agriculture Minister-Counselor in Ottawa reported that a major french fry processor on PEI could commence importing U.S. potatoes for processing effective March 24. The easement was granted under certain conditions governing cull disposal, which the importer has accepted. Despite this success, U.S. potato producers may again face a prohibition on shipments to PEI following the expiration of this latest easement.

GSM-102 credit guarantee program hops into action.

As of March 17, coverage totaling $2.3 million of hops and hop products has been authorized for shipment to Mexico. This is a an increase of $2.1 million in registrations since our last report of February 1995. For FY 1995, a total of $29.5 million has been allocated for coverage of horticultural commodities and products (see table, below). Under the GSM-102 credit guarantee program, repayment terms are usually three years. For example, through this program, the U.S. exporter can be paid by the U.S. bank immediately upon export if an irrevocable Letter of Credit is opened by the importer's bank and financed by the U.S. bank. The importer's bank then has up to three years to repay the U.S. bank. A slightly different approach has been specified for the FY 1995 program for Russia, which offers coverage only on 90-day terms. These repayment terms are also available for Mexico. ***(For further information on the GSM-102 program for horticultural commodities, contact Ross G. Kreamer, 202-720-9903.)***

FY 1995 GSM-102
Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1995 ($1,000)	Exporter Applications Approved ($1,000)	Balance ($1,000)
China			
Hops	6,000	0	6,000
Indonesia			
Potatoes 2/	2,000	0	2,000
Mexico			
Fresh Fruits 3/	5,000	0	5,000
Hops	5,000	2,300	2,700
Russia 4/	9,500	0	9,500
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Andean Region 5/			
Tree Nuts and Fresh Fruits 6/	1,000	0	1,000

1/ Coverage announced through March 17, 1994.
2/ Cut and frozen for french fries.
3/ Apples, pears, plums, peaches, nectarines, and strawberries.
4/ Apples, oranges, tangerines, lemons, pears, canned or frozen (corn, peas, mixed vegetables, tomatoes, green beans, and spinach). Sales must be registered by July 1, 1995; final export date is July 31, 1995.
5/ Includes Bolivia, Colombia, Ecuador, Peru, and Venezuela.
6/ Almonds, walnuts, pistachios, pecans, and hazelnuts; apples, pears, plums, peaches, nectarines, and strawberries.

Taiwan buys U.S. potatoes.

On February 28, Taiwan held its first import quota auction for 200 metric tons of U.S. table potatoes, according to the Agricultural Section Chief in Taipei. The four tenders of 10 tons each and one of the 40 ton tenders were successfully bid. However, the other 40 ton and the 80-ton tender were cancelled by Taiwan authorities because only one bidder had committed and Taiwan's regulations require at least three bidders on a tender. The successful bidding prices for the 80 tons of fresh potatoes ranged from $19 to $42 a ton. This first sale caps several months of U.S. efforts to enter the Taiwan fresh potato market.

U.S. horticultural exports not yet deriving benefit of EU single market directive.

The implementation of the European Union (EU) "Single Market" directive in 1993 and the harmonization of the phytosanitary regime has created new export opportunities for U.S. fruits to the southern-tier countries -- Portugal, Spain, Greece and Italy. Unfortunately, these new chances to sell to those EU countries have remained largely out of reach for U.S. exporters, for several reasons. First, lengthy shipping periods have limited gains for highly perishable products such as summer fruits. Second, EU production of most fruits available from the United States was at high levels in both 1993 and 1994. Finally, consumer demand in the EU for fruit seems to have eased with slower economic growth and restrictions on banana imports.

The outlook for the future is better, however, due to the EU's rapid ascent out of economic recession, and the prospect that the bumper crops of recent years are unlikely to recur indefinitely. This is particularly true for U.S. fruits and vegetables that can find windows when the EU-produced product is unavailable or not of high quality.

WORLD TRADE SITUATION AND POLICY UPDATES

India adjusts tariffs for dried fruits and nuts, keeps key almond provision unchanged.

India will not change the tariff structure this year for bulk almonds, according to a report from the Agricultural Counselor's office in New Delhi. This move allays U.S. industry fears of a tariff increase. As part of its annual budget process, India has announced assorted tariff adjustments for various dried fruits and nuts. This category of commodities represents the few consumer agricultural products that are presently allowed entry into India, and is believed to hold significant potential for future growth. U.S. exports of dried fruits and nuts to India in CY 1994 were valued at $24.4 million, with almonds accounting for 98 percent of that total.

According to the Agricultural Counselor's report, the tariff adjustments contained in the GOI's draft budget are as follows:

- -- Almonds (inshell/shelled): no change
- -- Almonds (consumer pack): tariff reduce from 65 percent to 50 percent
- -- Pistachios: tariff reduced from 65 percent to 50 percent [1/]
- -- Prunes: tariff reduced from 55 percent to 50 percent [2/]
- -- Raisins: tariffs to be reduced, however specifics are unclear. The Agricultural Counselor's office is seeking clarification.

[1/] To address the constant problem of under-invoicing by Iranian suppliers, which has effectively limited U.S. exports, the United States had been seeking the establishment of a specific duty to replace the existing ad valorem duty. This did not occur.

[2/] Use of potassium sorbate as a preservative on prunes remains a key outstanding issue. On February 21, 1995, an importer representing a leading U.S. supplier of dried prunes petitioned the Government of India to have potassium sorbate placed on the list of approved additives.

The Austrian nursery industry has been affected by EU accession.

Relatively high duties that have protected Austria's nursery industry have been eliminated for imports from other EU member countries. However, Austria's domestic nurseries should remain competitive in the market with medium and large size shrubs, bushes, and deciduous tree plants, because of relatively high transport cost for competitive products from the Netherlands and France.

On the other hand, competition in the market for small size potted plants, particularly from the Netherlands, will increase. There are 301 nurseries located in Austria.

Austria's banana market is in a transition period.

The European Union granted Austria a transition period for its banana imports. During the first quarter of 1995, Austria does not have to

distinguish between importers who previously imported so-called dollar (Latin) bananas or other bananas and/or primary or secondary importers for quota allocation. In addition, no export licenses are necessary for bananas from Colombia, Costa Rica, and Nicaragua. The quota allocation to the eleven (11) traditional importers is carried out as a percentage of their previous imports. In the first quarter of 1995, Austria has a national quota of 35,000 metric tons of dollar bananas.

The transition period is expected to be extended until June 31, 1995. However, in the second quarter of 1995, the national quota will be slightly reduced. The allocation system should remain unchanged, but export certificates will be required for imports from Colombia, Costa Rica, and Nicaragua.

EU refuses to grant waiver for import of U.S. potatoes.

EU officials dealing with phytosanitary matters met on February 23-24 to discuss a waiver for imports of fresh potatoes from third countries for processing. They decided not to grant the waiver because of concerns over the health risks of processing waste from non-EU potatoes, according to a report from the Agricultural Counselor in Brussels. The U.S. Mission to the European Union has indicated that a shortage of potatoes in the EU is much less severe than reported earlier. Furthermore, imports of frozen french fries from North America are so far fulfilling the unmet EU demand. U.S. exports of french fries to the EU have soared during July-January (1994/95) to 13,150 metric tons, up from 289 tons for the same period in 1993/94. Reports from potato processors indicate that this trend will continue for at least several months.

Brazil's orange juice production and export estimates have been increased due to the larger than expected Sao Paulo orange harvest.

The Sao Paulo orange production estimate for MY 1994/95 has been increased from a range of 270-282 million to 295 million boxes (40.8 kilos) due to higher than expected fruit production from the off-season bloom, and improved fruit development after rains returned in late-October and November. Sao Paulo's oranges for processing estimate for MY 1994/95 has correspondingly been increased from 230 to 243 million boxes. Brazil's total orange juice production estimate for 1994 (Brazilian marketing year 1994/95) has been increased from 1.07 million to 1.11 million tons (65 degrees brix) based on the larger Sao Paulo processing forecast. Orange juice extraction rates in Sao Paulo are estimated at a record due to the effects of the drought. The larger Sao Paulo output is expected to offset lower orange juice production in other states, mainly the Northeast Region, where favorable fresh market prices diverted fruit from the processing sector.

The MY 1994/95 total Brazil orange juice export forecast has been increased from 1.06 to 1.09 million tons. Larger than expected shipments from the state of Sao Paulo should offset smaller shipments from other regions, primarily the Northeast, where processing was down due to more favorable fresh market prices.

The extreme dry weather conditions that hit the Sao Paulo citrus area during the second half of 1994 are impacting the 1995/96 crop bloom. The specific impact on the 1995/96 crop is not clear at this early stage, but industry sources indicate processing will be delayed 60 days. On March 21 the Sao Paulo citrus industry released its first 1995/96 orange crop forecast at 320 million (40.8 kilo) boxes. The USDA will release its first 1995/96 Brazilian orange crop forecast in June.

(SEE NEXT PAGE FOR TABLE ON BRAZIL'S ORANGES AND FCOJ SUPPLY AND DISTRIBUTION)

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ[1/]

	1992	1993	1994
Oranges, Sao Paulo		**Millon Boxes [2/]**	
Production [3/]	314	302	295
Fresh Consumption	38	51	49
Fresh Exports	2	2	3
Processed	274	249	243
FCOJ, Brazil		**1,000 Metric Tons, 65 Degrees Brix [4/]**	
Beginning Stocks	68	105	100
Production	1,145	1,113	1,110
Sao Paulo	1,100	1,060	1,090
Other States	45	53	20
Exports [5/]	1,090	1,100	1,090
Sao Paulo	1,045	1,047	1,070
Other States	45	53	20
Consumption	18	18	25
Ending Stocks	105	100	95
FCOJ Yields (kg/box)	**4.01**	**4.22**	**4.49**

1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.
2/ 40.8 kilograms or 90 pounds.
3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.
4/ One Metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.
5/ Includes tangerine juice

U.S. apple export forecast for 1994/95 has been reduced.

FAS has reduced its U.S. apple export forecast for the 1994/95 season (July-June) from 852,000 tons to 639,000 tons based on further analysis including more recent U.S. export data and information from the trade sector. The new forecast is 5 percent above last year's total export level of 609,000 tons. This season export growth in Latin American and Asian markets is compensating for the slowed pace sales to Mexico. The new information updates USDA's apple export forecast published in the March 1995 issue of USDA's ***World Horticultural Trade & U.S. Export Opportunities*** in the article "**World Fresh Apple and Pear Update: Focus on Southern Hemisphere Countries and U.S. Export Performance**".

Table Grape Situation for Selected Countries

Selected Southern Hemisphere countries are forecast to export slightly fewer table grapes in 1995, in line with lower production. Shipments from Southern Hemisphere countries in 1994 are revised upward to 542,908 tons, the highest level in four years, due primarily to an aggressive campaign by South Africa. Selected-country table grape exports for 1994 are estimated at 1.74 million tons, about five percent above the previous year, based on higher production and larger exportable supplies in the European Union. United States table grape production for 1994 is estimated at 728,200 tons, a slight increase over the previous year. U.S. exports in 1994 reached 218,855 tons, the highest level in four years. Brazil is developing export potential and targeting the United States with seedless grapes. India's 1994 export shipments to EU countries were reportedly successful in diversifying markets.

SOUTHERN HEMISPHERE

Table grape harvest in 1995 forecast lower in Southern Hemisphere countries.

Table grape production in 1995 for the Southern Hemisphere countries of Argentina, Chile, and South Africa is forecast at about 1.09 million tons, or three percent below the 1994 outturn. Over the past four years the Southern Hemisphere producers have accounted for about a third of global trade in table grapes when trade within the EU is included. There has also been a concurrent increase in vineyard investment and improvements in post-harvest technology that have resulted in larger export availabilities of generally better quality fruit. In Chile, the dominant exporter, the last few seasons have been difficult financially, as the strengthening peso and other factors have led to markedly lower returns to growers. Growers caught in the current economic straits have curtailed investment, thereby stalling the rate of expansion of vineyards.

U.S. growers have adjusted to this bipolar production by switching to varieties that complement, rather than compete with, exportable supplies from the Southern Hemisphere. This has been key to the good health of the U.S. industry, as Southern Hemisphere producers are primarily export oriented. Shipments of table grapes from the three selected producers rose about nine percent over the first four years of the 1990s, but are forecast somewhat lower in 1995 on expected smaller output.

Southern Hemisphere Exports 1/
(Metric Tons; Calendar Years)

Country	1991	1992	1993	1994	1995
Chile	423,000	429,000	441,000	445,000	440,000
South Africa	65,313	77,607	67,075	93,755	90,000
Argentina	11,663	6,984	4,500	4,153	3,500
TOTAL	**499,976**	**513,591**	**512,575**	**542,908**	**533,500**

1/ Data for 1995 are forecasts.
Source: USDA/FAS post reports.

Argentina's 1995 export performance likely affected by hail-reduced availabilities.

Table grape production in 1995 in Argentina is expected to fall about 20 percent from last

season due to severe late-season hail storms in several major producing areas, especially in Mendoza province. This is the lowest level in five years. Argentina's exports of table grapes have contracted over the past five years, in part due to lower production. The bulk of Argentina's exports go to EU member states.

Argentina: Table Grape Exports
(Metric Tons; Calendar Years)

Market	1990	1991	1992	1993	1994
Brazil	6,799	5,251	1,186	823	1,423
Germany	4,594	2,607	1,976	595	82
Netherlands	4,349	2,345	3,067	1,968	2,956
Italy	544	1,225	650	358	60
France	338	52	0	79	74
Sweden	181	66	0	182	182
United Kingdom	104	91	105	268	350
Canada	100	0	0	0	7
Others 1/	51	0	0	10	74
TOTAL	**17,060**	**11,663**	**6,984**	**4,283**	**5,208**

Source: USDA/FAS post reports
Totals may not add due to rounding.

South Africa's table grape exports exploded in 1994 due to record production and a devalued rand.

Production in South Africa for 1995 is forecast lower at 139,000 tons, as unseasonably dry weather conditions returned. Last season's harvest benefitted from a return to normal weather, surpassing earlier estimates and reaching a record 143,500 tons. South Africa's table grape exports in 1994 soared 40 percent above the previous year to a record 93,755 tons, bolstered by record production, a devalued rand and the lifting of trade sanctions in many markets. For the current year, exports are expected to settle slightly at about 90,000 tons.

Air-freight exports of early crop table grapes targeted for the Christmas market in Europe reportedly did very well this season. The government's decision to discontinue the General Export Incentive Scheme (GEIS) on April 1, 1995, is seen as a major blow by the export-oriented South African industry. Although export opportunities have been enhanced by a devalued rand, the loss of the GEIS (about 5.5 percent on FOB value) means shippers will have to redouble efforts to remain competitive.

Chile leads Southern Hemisphere exporters and seeks to diversify markets.

Table grape output in 1995 in Chile, the premier Southern Hemisphere exporter of table grapes, is forecast to reach 850,000 tons, a slight decline from last year. Chile's production in coming years is likely to stabilize, as output from new plantings and immature vines is balanced by areas with declining yields or by the uprooting of unprofitable vineyards. The current leveling of production is in part due to comparatively better prospects for wine grapes than for table grapes. In fact, planted area is estimated to have fallen for the first time on record.

Growers have been squeezed in export markets by a strong Chilean peso and at home by rising production costs. This situation has reportedly led to greater indebtedness and bankruptcy among an increasing number of growers. Despite this somber tone, strong prices and steady demand in the early stages of the 1995 season will help sustain Chile's exports at about 440,000 tons, down marginally from last year's record campaign.

The table below shows that about 60 percent of Chile's table grape exports went to the United States in 1994 (Jan-Oct). According to industry sources, the pace of Chilean shipments to the United States has been quite brisk in 1995. Prices (FOB) during the first five weeks of the shipping period remained in the $14-$16/box range for large-berry Thompson Seedless and Flame varieties. U.S. importers are reportedly satisfied with the quality of Chilean table grapes, although there has been some concern about consistency. A joint Chilean Government/private sector proposal to institute mandatory quality control measures for fresh fruit was derailed in late 1994 by opponents of the bill. As a result, only voluntary standards are in place for this season.

Over the past several years Chile has pursued a strategy of diversifying export markets. One of

the areas of interest is neighboring Latin America, where improving national economies and lowering of import barriers could support development of lucrative table grape markets. The table below shows that strides toward this goal were made in 1994. However, the current financial situation in Mexico and its repercussions through the region will probably mean continued reliance on the United States and EU markets in the near term.

CHILE: Table Grape Exports
(Calendar Years; Metric Tons) 1/

Market	1990	1991	1992	1993	1994
United States	333,807	288,160	279,513	282,699	250,309
Netherlands	52,592	62,869	69,637	64,971	60,633
Germany	n/a	n/a	5,968	6,912	7,303
United Kingdom	12,267	16,310	15,575	16,801	22,519
Mexico	n/a	n/a	10,965	19,504	23,619
Saudi Arabia	8,726	7,997	8,590	7,114	6,441
Japan	7,678	2,880	4,002	4,181	4,562
Brazil	6,953	7,808	n/a	3,170	5,203
Belgium	4,939	2,943	4,651	4,949	4,999
Hong Kong	3,220	5,649	7,372	8,471	9,122
Others	20,039	28,384	28,475	18,402	27,385
TOTAL	450,221	423,000	428,780	440,677	422,095

Source: USDA/FAS post reports from Santiago.
1/ Data for 1994 are preliminary, Jan-Oct; "n/a" denotes volume not specified. Totals may not add due to rounding.

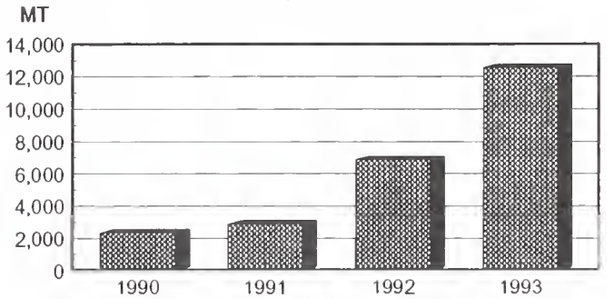
Brazil poised to develop seasonal niche market in the United States.

Brazilian table grapes have a window of opportunity in the United States and Europe from the end of November through January. This is the period between the end of the U.S. supplies and the start of Chile's export campaign. Although table grape area has been relatively stable during recent years, increased production from irrigated vineyards in the Northeast has resulted in better yields and greater export availabilities. The predominant variety is a seeded "Italia" grape, whereas in Jundiai, in South Brazil, the major varieties are Niagara (white) and Rosada (red). In an effort to enhance export potential in Northeast Brazil, growers are experimenting with different varieties, such as Thompson Seedless and Red Globe. Development of the region has been assisted by a five-year, $1 million project aimed at seedless varieties. Funding for these activities has come in part from government sources, the World Bank (IBRD), and private Brazilian banks.

Currently, the bulk of Brazil's table grape exports originates in the Sao Francisco Valley, an area that benefits from irrigation supplies from the Sobradinho dam. This valley supports about 40 irrigation districts and is reportedly similar in some respects to the semi-arid areas of the Central Valley of California, with average annual rainfall of about 380 millimeters and humidity at 57 percent.

The Brazilian Grape Marketing Board (BGMB) was organized in 1992 and comprises 14 grower groups based in the Sao Francisco Valley. The BGMB accounted for about 45 percent of Brazil's table grape exports in 1993, almost three-quarters of which were destined for EU countries. Brazil targeted the U.S. market this past Christmas with small quantities (about 250 tons) of both seedless and seeded "Italia" grapes. Next season could witness larger volumes of different variety grapes from Brazil, as it carves a wider niche in the important U.S. market.

BRAZIL TABLE GRAPE EXPORTS RISE
Metric Tons; Calendar Years



1/ Data for 1994 through October; last two months are peak period
Source USDA/FAS report BR4647

NORTHERN HEMISPHERE

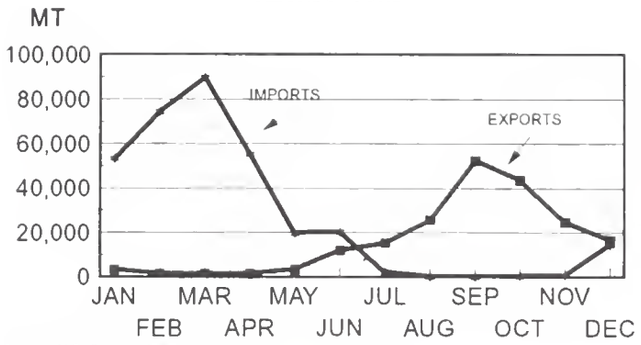
United States grape exports reach four-year high in calendar 1994.

U.S. table grape production for 1994 is estimated at 728,200 tons, slightly above the 1993 revised crop outturn of 726,100 tons. Exports during

calendar 1994 soared to 218,855 tons, a four-year high. Although one of the top competitors in world table grape trade, the United States is a net importer. The graph shows that, on average, imports occur primarily during the first half of the year and supplement dwindling domestic supplies. Imports fall precipitously leading into the start of the U.S. table grape harvest.

UNITED STATES: TABLE GRAPE TRADE

AVERAGE MONTHLY IMPORTS AND EXPORTS, 1990-1994
METRIC TONS

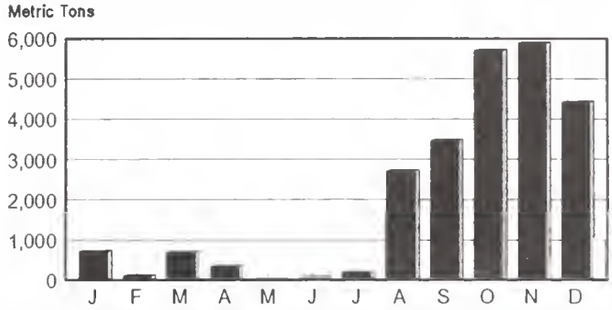


Source U.S. Census data
1/ Monthly data are averaged for period 1990-1994

NAFTA and the Asian Tigers are major U.S. markets.

About 58 percent of total U.S. table grape exports in calendar 1994 were shipped to NAFTA neighbors, virtually unchanged from the preceding year. However, shipments to Mexico soared 270 percent during the same period, making Mexico the top export market after Canada. Despite its current financial difficulties, Mexico continues to offer tremendous potential as an export market for U.S. table grapes. Under NAFTA, U.S. grapes enter Mexico duty free from October 15-June 1, a window of opportunity that helps fuel late-season sales from California. To some extent, growth in Mexico is somewhat constrained by import duties (16 percent in 1995) in place for the balance of the year. These duties will be phased out over the next eight years under NAFTA. The following table shows the pace of exports to Mexico in calendar 1994. U.S. table grape exports gained momentum in 1993 following the replacement of import licensing restrictions with a pre-NAFTA quota, and the conclusion of the phytosanitary agreement between the two governments.

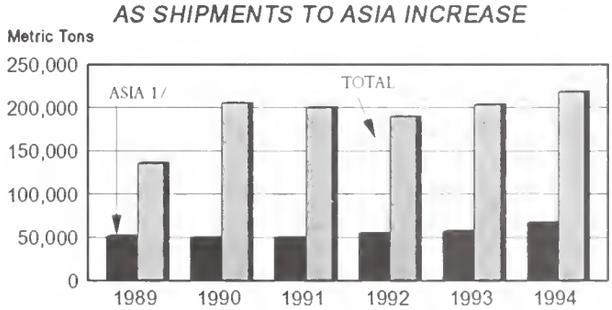
MONTHLY U. S. TABLE GRAPE EXPORTS TO MEXICO SOAR DURING DUTY-FREE PERIOD, OCT 15-JUNE 1



Calendar 1994 exports to Mexico totaled a record 24,379 tons
Source U.S. Census data

Asia continues to be one of the fastest growing regions for U.S. table grapes. Lead by mature markets in Japan and Taiwan, the region has recently roared to life as the industrializing countries of Southeast Asia have begun to demand imported fruit. Exports to Asia reached 66,954 tons in calendar 1994, an 18 percent jump over the previous year. Continued brisk economic growth throughout the region will doubtless translate into higher trade flows for consumer goods including horticultural commodities such as table grapes. Prospects on the trade policy front also appear promising, as countries remove non-tariff barriers and lower duties in the run-up to the new World Trade Organization.

U. S. TABLE GRAPE EXPORTS RISE AFTER 1992 AS SHIPMENTS TO ASIA INCREASE

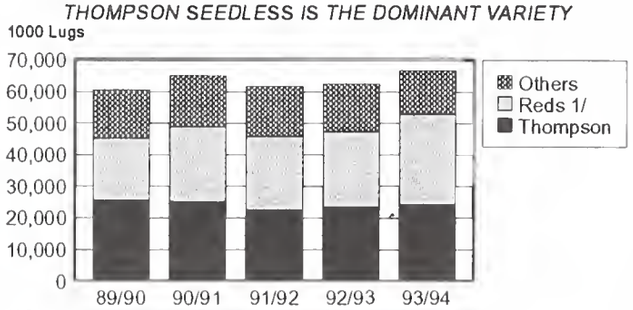


1/ Hong Kong, Taiwan, Japan, Singapore, Indonesia, Malaysia, Thailand, and the Philippines
Source U.S. Census data

Thompson Seedless dominates, but other varieties are on the move.

The following chart presents domestic shipment data for California's many varieties of table grapes over the last five marketing years (May/Apr). Thompson Seedless is by far the most abundant variety, although others such as Ruby, Flame, and Red Globe have been gaining in popularity.

DOMESTIC SHIPMENTS OF CALIFORNIA TABLE GRAPES
THOMPSON SEEDLESS IS THE DOMINANT VARIETY



1/ Category includes Ruby/Red, Flame, Red Globe and Christmas Rose
2/ A lug unit equals 12 7 kilograms Year is May/Apr
Source California Table Grape Commission, 1994

Chile and Mexico supply the off-season market in the United States.

Chile dominates the U.S. market for imported table grapes, with Mexico a distant second. Together these two suppliers accounted for 98 percent of total table grape imports over the past five years. Imports from Mexico face a zero percent duty, a feature that has recently stimulated some interest from investors seeking foreign exchange opportunities.

United States: A Net Importer of Table Grapes Mostly from Chile and Mexico (Metric Tons; Calendar Years)

Supplier	1990	1991	1992	1993	1994
Chile	344,437	287,183	278,047	279,205	280,910
Mexico	26,192	42,896	37,056	41,305	41,074
Others 1/	2,924	2,396	1,816	957	1,976
TOTAL	**373,553**	**332,475**	**316,919**	**321,467**	**323,960**

1/ Other suppliers category includes Canada, Argentina, Italy and Brazil.
Source: U.S. Census Data

India continues to develop EU export markets for its Maharastra Thompson Seedless.

India's recent entry into the export table grape market appears to be making headway. Revised estimates of the 1993 campaign (February-April) to the comparatively high-value EU and Scandinavian markets place exports at about 2,900 tons. Estimates of 1994 exports to Europe were pegged at between 8,000 and 9,000 tons of Thompson Seedless grapes. Crop damage and subsequent quality loss resulting from heavy monsoon rains in August and September 1994 could mean reduced export availabilities this season. Exporters were reportedly hopeful that shipments in the 1995 campaign will reach about 6,500 to 7,000 tons. Buyers are generally pleased with the quality of Maharastra table grapes this season. While the United Kingdom is likely to remain the dominant market, exporters are planning increased shipments to the Netherlands, Germany and Scandinavian countries. There are indications that Asian markets such as Hong Kong will have to wait until the 1996 season for Indian table grapes, as tight supplies of export-quality fruit this year has focused shippers' efforts on filling contracts of EU customers.

Indian Exports of Table Grapes 1/ (Calendar Years, 1991-1995; Metric Tons)

Market	1991	1992	1993	1994	1995
Gulf States	5,300	11,000	10,100	10,000	11,000
EU Markets	0	0	2,900	8,500	4,500
Others 2/	0	0	3,000	3,000	3,000
TOTAL	**5,300**	**11,000**	**16,000**	**21,500**	**20,500**

1/ Exports are primarily Thompson Seedless variety.
2/ Others category includes Bangladesh.
Source: GOI data for 1991-1993; preliminary data for 1994 are based on discussions with exporters and industry sources. 1995 is forecast.

For further information on supply, distribution, and trade, contact Ross Kreamer at 202-720-9903. For information on marketing opportunities, contact Elise Pinkow at 202-690-1341. For information on production, contact Kelly Kirby Strzelecki at 202-720-6791.

TABLE 1
TABLE GRAPES: PRODUCTION, IMPORTS & EXPORTS IN SELECTED COUNTRIES
(Metric Tons)

COUNTRY/ YEAR 1/	PRODUCTION	IMPORTS	EXPORTS
NORTHERN HEMISPHERE			
France			
1991	70,400	162,900	11,100
1992	89,200	159,300	13,900
1993	102,800	154,300	15,500
1994	80,000	175,000	10,000
Greece			
1991	373,672	211	109,298
1992	336,198	233	106,881
1993	353,283	250	95,000
1994	340,000	250	100,000
Italy			
1991	1,410,790	11,390	461,090
1992	1,678,000	11,515	513,840
1993	1,573,000	10,000	643,800
1994	1,650,000	10,000	680,000
Spain			
1991	461,600	2,900	115,900
1992	403,100	4,100	123,300
1993	344,800	13,000	109,200
1994	406,700	7,000	125,000
SUBTOTAL EU 1/			
1991	2,316,462	177,401	697,388
1992	2,506,498	175,148	757,921
1993	2,373,883	177,550	863,500
1994	2,476,700	192,250	915,000
Japan			
1991	270,600	7,600	0
1992	276,100	7,700	0
1993	259,900	7,800	0
1994	271,900	8,000	0
Mexico			
1991	345,000	4,000	45,000
1992	285,000	12,700	42,000
1993	258,000	30,000	47,500
1994	238,000	36,000	40,000
Turkey			
1991	3,600,000	0	12,223
1992	3,450,000	0	16,170
1993	3,700,000	0	22,536
1994	3,700,000	0	26,000
United States 2/			
1991	726,110	332,475	200,327
1992	697,625	316,919	189,831
1993	726,100	321,467	203,813
1994	728,200	323,960	218,855
SUBTOTAL Northern Hemisphere			
1991	7,258,172	521,476	954,938
1992	7,215,223	512,467	1,005,922
1993	7,317,883	536,817	1,137,349
1994	7,414,800	560,210	1,199,855

TABLE 1 (Cont.)
TABLE GRAPES: PRODUCTION, IMPORTS & EXPORTS IN SELECTED COUNTRIES
(Metric Tons)

==========SOUTHERN HEMISPHERE==========			
Argentina			
1991	160,000	0	11,663
1992	150,000	0	6,984
1993	110,000	0	4,500
1994	120,000	2,283	4,153
1995	100,000	3,000	3,500
Chile			
1991	795,000	0	423,000
1992	795,000	0	429,000
1993	855,000	0	441,000
1994	855,000	0	445,000
1995	850,000	0	440,000
South Africa			
1991	112,212	0	65,313
1992	127,100	0	77,607
1993	113,075	0	67,075
1994	143,463	0	93,755
1995	139,000	0	90,000
SUBTOTAL Southern Hemisphere			
1991	1,067,212	0	499,976
1992	1,072,100	0	513,591
1993	1,078,075	0	512,575
1994	1,118,463	2,283	542,908
1995	1,089,000	3,000	533,500
==========TOTAL SELECTED COUNTRIES==========			
TOTAL			
1991	8,325,384	521,476	1,454,914
1992	8,287,323	512,467	1,519,513
1993	8,395,958	539,100	1,649,924
1994	8,533,263	563,210	1,742,763
1995	n/a	n/a	n/a

1/ Calendar year for all countries. EU data includes intra-EU trade.

2/ U.S. export data include substantial quantities that are re-exported. U.S. trade data for 1989 and 1990 have been revised as follows: 1989 imports = 280,723 tons; 1989 exports = 191,887 tons; 1990 imports = 373,553 tons; 1990 exports = 205,562.

Outlook for Concentrated Apple Juice Production and Trade for Selected Countries

In 1994/95 production of concentrated apple juice (CAJ) for selected countries is forecast at 597,000 tons (70/71 degree brix), a decline of 9 percent from last year. Declines in CAJ production in Northern Hemisphere countries--in particular Poland, Austria, and Spain--will more than offset increases in Southern Hemisphere countries. The United States, the largest CAJ consumer and producer in the world, is forecast to produce 154,000 tons, a 5 percent rise over last year because of the bumper Northwest apple harvest available for processing. U.S. exports in 1994/95 are forecast at 11,000 tons, about 35 percent ahead of last year's pace because of growth in the Asian markets of Japan and Korea coupled with the impact of the devalued U.S. dollar lowering the price of U.S. CAJ in export markets. In 1994/95 U.S. CAJ imports, which far exceed exports, are forecast to drop about 10 percent from last year to 183,000 tons. Reduced supplies from Eastern European countries will push up prices, a record U.S. apple crop will decrease CAJ import demand by Northwest CAJ processors, and devaluations in the U.S. dollar will increase the price of imports. Almost 80 percent of U.S. imports, by value, are sourced from Argentina, Chile, Germany, and Eastern Europe.

Southern Hemisphere

Concentrated apple juice production in 1994/95 is forecast at 153,000 tons for selected Southern Hemisphere producers, a 5 percent increase over last year. Apples for processing will be readily available as the result of this season's record apple crop of 3.9 million tons.

Argentina, the leading CAJ producer in the Southern Hemisphere, will process even more fruit than last year because of a record 1.1 million ton apple crop.

Production of CAJ in 1994/95 is forecast at 59,000 tons, an increase of 4 percent from last season because of an abundance of smaller sized fruit not suitable for fresh consumption or export markets. Additionally, Argentine processors estimate that juice export prices will increase this season, favoring a higher level of processing than usual.

Argentina processes about 45 percent of fresh apple production into CAJ, the largest percentage of selected countries. By comparison, the United States processes only about 23 percent. An estimated 79 percent of Argentina's processed apple crop goes to CAJ, 16 percent for cider, and 5 percent dried or processed into jams, vinegar, and other products.

The United States is Argentina's leading overseas CAJ market, accounting for 95 percent of export destinations by volume.

Argentina: CAJ exports
(metric tons, 70/71 degree brix)

Market	1992	1993	1994 1/
U.S.	59,299	55,887	21,062
Japan	1,410	2,750	822
Chile	n/a	245	0
Uruguay	23	60	50
New Zealand	n/a	0	20
Others	3,237	152	49
TOTAL	63,969	59,094	22,003

1/ 1994 data is for Jan-June.

Chilean CAJ industry focuses on improving quality by encouraging growers to plant sour and new apple varieties.

In 1994/95 Chile is forecast to produce 31,000 tons of CAJ, slightly above last year's level, but 9 percent below 1992/93. Chile's CAJ industry started reducing output in 1994 because of a world oversupply despite an ample supply of fresh domestic apples. Production in 1995 will follow the same trend. Average FOB prices for CAJ in Chile fell from $1,010/ton in 1993 to $830/ton in 1994. As a result, juice apple prices paid to growers declined from $60/ton to $25/ton between 1993 and 1994.

In general, Chile's apple crop is more geared to the fresh market than Argentina's because of more efficient production of export-quality fruit.

As a result of depressed CAJ prices, Chilean buyers have started paying more attention to the quality of Chilean CAJ. To better compete in the world market, the CAJ industry is encouraging Chilean farmers to increase production of sour apples as well as other new varieties. This expansion is taking place in Region Ten (Osorno) where sour apple varieties are more suitable for growth. Industry managers hope to increase the proportion of sour apples being blended with the abundant Red Delicious varieties.

As the following table illustrates, the United States accounts for about 80 percent of the CAJ market, although Japan and Australia have gained market share recently. Latin American markets are also gaining a share of Chile's export market.

Chile: CAJ exports
(metric tons, 70/71 degree brix)

Market	1992	1993	1994 1/
U.S.	25,540	27,025	15,740
Japan	4,022	4,352	6,199
Australia	1,267	917	1,619
Mexico	n/a	196	513
Columbia	n/a	0	463
New Zealand	n/a	0	266
Vietnam	n/a	177	0
Other	2,741	588	166
TOTAL	33,570	33,255	24,966

Source: USDA Attache reports
1/ Data available through 6/94

New Zealand's CAJ production estimated 27 percent higher in 1994/95 because of abundant apple supplies.

The volume of apples processed into CAJ in 1994/95 is estimated to be 22,000 tons, an increase of 29 percent. A record domestic apple crop will provide an ample supply of apples for processing. This season's favorable weather conditions and maturation of new apple varieties are responsible for the increase. Processing volumes were low last year because hail-damaged fruit was unsuitable for processing and growers placed the rest of their crop in the domestic fresh market.

The local market for apple juice continues to improve for the Apple and Pear Marketing Board's products, offsetting depressed market conditions for juice concentrate in the international market. The Board's branded product line added plastic bottles in the 2 liter and 20 ml. range. Domestic juice consumption has jumped from 5.7 liters/capita in 1988 to 8.6 liters/capita in 1993.

Japan, Australia, and the United States are New Zealand's key export markets, as illustrated below.

New Zealand: CAJ exports (June-May)
(metric tons, 70/71 degree brix)

Market	1991	1992	1993
Japan	4,670	4,385	7,239
Australia	4,221	5,891	5,223
United States	3,796	1,566	2,306
Canada	992	663	472
Singapore	115	81	192
Others	801	543	637
TOTAL	14,595	13,129	16,069

Source: USDA Attache reports

Australia is the only Southern Hemisphere country forecast to reduce CAJ production in 1994/95.

Australia is forecast to produce 14,800 tons of CAJ in 1994/95, below last year's level of 15,600 tons. Low world CAJ prices, large global CAJ supplies, and an average domestic crop are compelling processors to reduce production.

Northern Hemisphere

In 1994/95 total CAJ production for selected Northern Hemisphere countries is forecast to drop to 444,000 tons, a decrease of 13 percent from the previous year. Production declines in Poland, Spain, and Austria will more than offset production increases in the United States and France.

Record U.S. crop drives up CAJ production in 1994/95.

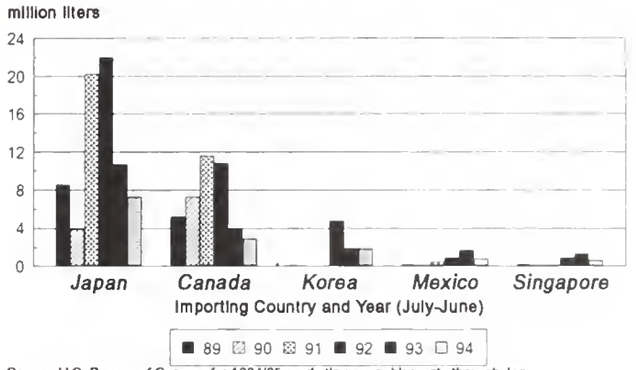
The United States, largest CAJ producer in the world, is forecast to produce 154,000 tons of CAJ in 1994/95, up 5 percent from last year. The increase is attributed to this year's bumper apple crop in Washington State, fueling both exports of fresh apples and processing into juice.

The United States, one of the world's leading apple producers, exports and consumes a large share of its fresh apple crop. Thus, to met the consumer demand for apple juice, imports of CAJ meet the shortfall and far exceed exports. For example, during 1993/94 imports were valued at $204 million while exports were valued at only $38 million. Imported CAJ is vital to meet the U.S. juice stock needs and to supplement domestically processed apples.

U.S. CAJ exports surge to Asian markets thus far this season.

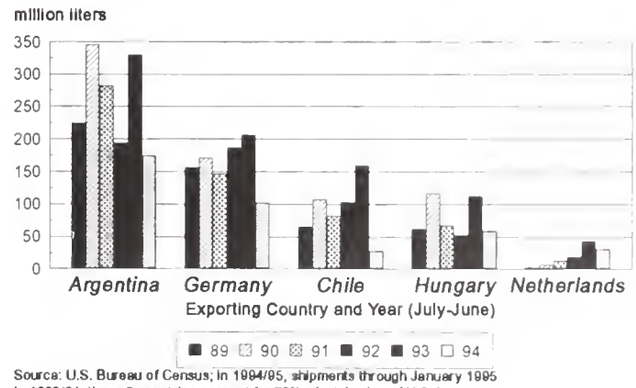
Exports in 1994/95 are at a pace 35 percent ahead of last season. The largest U.S. export markets continue to be Japan, Canada, Korea, and Singapore. Exports to Japan in 1993/94, valued at $20 million, comprised about 50 percent of total U.S. exports during the season. Exports for the remainder of this season are forecast to continue this rapid pace because of the relative strength of the Japanese yen compared with the U.S. dollar.

Japan continues to lead top export markets for U.S. CAJ in 1994/95



Source: U.S. Bureau of Census; for 1994/95 marketing year shipments through Jan
In 1993/94, these 5 countries imported 85% of total value of U.S. shipments

...While Argentina is leading supplier of CAJ to the U.S.

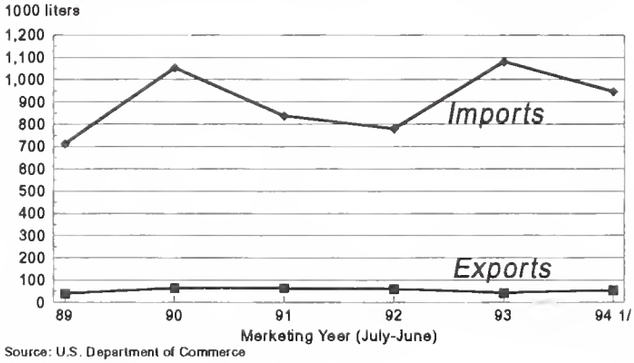


Source: U.S. Bureau of Census; in 1994/95, shipments through January 1995
In 1993/94, these 5 countries account for 79% of total value of U.S. imports

U.S. imports thus far in 1994/95 have fallen off by about 10 percent. Abundant apple supplies in the Northwest have provided sufficient product for processors in the West, thus reducing demand for imported CAJ. Second, CAJ imports by processors in the Eastern U.S. are forecast to drop because of reduced CAJ production and higher prices from Eastern European sources such as Hungary and Poland.

Though import levels through December 1994 show higher imports from Eastern Europe and Germany, the pace is forecast to slow down as the season progresses and the effects of the production shortfall are felt in the world marketplace. Thus far, a significant volume of U.S. imports from the Northern Hemisphere countries has come from foreign-held carry-in CAJ stocks from the 1992/93 and 1993/94 crops.

U.S. CAJ trade forecast in 94/95: imports drop while exports rise



Source: U.S. Department of Commerce
1/ 1994/95 forecast based on export trend through 1/95

Imports from Argentina, Chile, and Brazil, which supply about 50 percent of U.S. CAJ, are also down thus far this season with a pace 36 percent behind last year. Imports from Chile are only 5,000 tons, a drop of 77 percent from the same time period last year.

The total value and volume of U.S. imports fluctuates greatly depending on world price and available stocks. The peak was $311 million in 1991/92, falling to a five year low of $204 million in 1993/94.

Despite 41 percent lower production in 1994/95, Poland still leads European CAJ producers.

Poland is the second largest producer of CAJ in the world after the United States. Production of CAJ is forecast at 80,000 tons in 1994/95, down 41 percent from last year. This season a smaller crop of apples is estimated because of drought, frost losses, apple scab disease, and insufficient pesticide application. The apple crop is estimated to have fallen 27 percent in 1994/95.

The Polish processing industry faces severe financial problems. Some processors are having difficulties obtaining short term credits for apple procurements from producers. Hortex, which processes over 30 percent of the apples in Poland, is highly in debt and threatened with bankruptcy. Nevertheless, CAJ production has potential for growth as evidenced by many growers switching from apples for fresh consumption to varieties more suitable for processing. Long-range forecasts indicate that Polish production of apples may increase to 2 million tons and lead to a growth in CAJ output.

Although Poland is the largest CAJ exporter in the world, levels are forecast to drop significantly this season because of the reduced apple crop size. Total exports will reach only 60,000 tons, a 45 percent decline from 1993/94. Germany and the Netherlands are Poland's major export markets. In 1993/94 Poland exported 83,000 tons to Germany and 11,000 tons to The Netherlands, accounting for 86 percent of total exports. Most Polish CAJ exported to Germany is processed and reexported to the United States. For U.S. importers Poland's higher acidity levels is less desirable than the product produced by Germany.

Germany, a leading CAJ importer after the United States, is forecast to decrease imports by 25 percent in 1994/95.

In 1994/95 German CAJ production is estimated to be 60,000 tons, about equal to the 1993 level. The bumper apple crop throughout Europe in 1992/93 enabled German processors to increase stocks of CAJ. In 1993, with a more normal apple crop, production of apple juice declined. Stocks,

however, remained abundant in 1993/94 because of large imports of CAJ from Poland, Italy, Turkey, and Hungary.

The German apple juice industry relies heavily on imports of apple juice concentrates, and Poland is, by far, the largest supplier of CAJ to Germany. As the result of a shortage of apples from Eastern European countries lead by Poland, Germany's total imports are forecast to drop 25 percent this season.

Germany's exports are forecast to be 90,000 tons in 1994/95, a rise of 6 percent from last year. The United States is Germany's most important export destination followed by EU member states.

Germany: CAJ exports (July-June)
(metric tons, 70/71 degree brix)

Market	1992/93	1993/94 1/
United States	33,610	35,039
EU	40,661	32,711
Netherlands	11,154	9,611
Great Britain	12,862	8,918
Belgium/Lux.	6,560	4,846
Denmark	4,742	3,294
France	2,262	2,584
Italy	1,212	2,351
Greece	1,869	1,107
Canada	3,197	4,757
Japan	1,804	3,242
Russia	680	880
Others	2,958	2,141
TOTAL	82,910	78,770

Source: USDA Attache reports
1/ Data available only through April 1994

Germany: CAJ imports (June-May)
(metric tons, 70/71 degree brix)

Market	1992/93	1993/94 1/
Poland	65,931	77,882
Italy	39,964	29,514
Turkey	19,436	18,375
Hungary	7,297	11,829
Ukraine	4,593	8,185
Russia	5,361	8,099
Moldova	n/a	7,583
Czech Rep.	n/a	4,574
Austria	n/a	4,166
Romania	n/a	3,803
Others	44,144	23,694
TOTAL	186,726	197,704

1/ Data available only through April 1994
Source: USDA Attache reports

Spain's CAJ production is expected to drop 46 percent lower this season because of a shortage of apples for processing.

As the result of a smaller apple crop, 1994/95 CAJ production in Spain is forecast at 9,000 tons, a 46 percent drop from last year. Spain had little or no CAJ stocks in 1993/94 and none are expected in 1994/95. Exports of CAJ have also fallen significantly the last 2 years, adding to the Spanish industry's pessimism about obtaining enough apples for processing. Apple farmers obtain better prices for apples diverted to the EU withdrawal program than for apples bought by apple juice processors. Farmers received 13-14 pesetas/kg for withdrawn apples and 8-10 pesetas/kg for processing apples. In response, the Spanish juice and canning industry has requested the EU to direct excess fruit to the processing sector to cover supply needs instead of moving fruit into withdrawal.

Spanish CAJ exports fell 68 percent in 1993/94 and are forecast to fall 33 percent this season because of the problems related to apple supplies. Lower world prices for CAJ have also depressed export sales in recent years. Germany, France, and the United Kingdom were Spain's major export destinations. Spanish CAJ imports are forecast to

rise 80 percent this season to 2,700 tons in response to lowered domestic production. European Union member states are the major source of CAJ imports followed by South Africa and Poland.

Hungary's CAJ processors receive a 30 percent export subsidy to bolster exports, but reduced apple supplies hurt CAJ production in 1994/95.

The Hungarian CAJ industry faces financial problems as evidenced by processor bankruptcy in recent years. Production in 1994/95 is estimated to drop 6 percent to 31,000 tons because of a reduced apple crop. Despite these difficulties the CAJ industry will persevere over the next 5 years for several reasons. Apple farmers are forced to sell fruit to processors because fresh market opportunities are limited. Processors, in turn, enjoy a ready export market for CAJ and even receive a 30 percent export subsidy from the Government of Hungary. However, for 1995 the government has indicated it will favor export credit guarantees and preferential loans for exporters instead of export subsidies.

In summary, production is forecast to stagnate at around 30,000 tons annually the next 5 years as apple production continues falling and domestic demand for fresh apples strengthens. Hungary, which exports most of its CAJ production, is forecast to export 29,000 tons in 1994/95, a slight reduction from last year.

French CAJ production rebounds in 1994/95 after last year's dismal year.

French CAJ production is expected to rebound this year compared with last year with 17,000 tons forecast in 1994/95, an 18 percent increase. The increase is the result of an increased crop of cider and table apples being supplied to the processing industry.

French trade of CAJ reflected changes in France's apple crop the last 2 years. Exports of CAJ have climbed the last 2 years by about 10 percent each year. Spain replaced Germany as France's leading supplier of CAJ, while the United Kingdom continues as the major importer of French CAJ.

Austria's CAJ marketing efforts pay off as sales to Japan increase significantly.

In 1994/95 Austrian production is forecast to fall 31 percent to 16,000 tons because of a 13 percent decline in apple output and large stocks of CAJ. Frequent rain reduced pollination levels in the spring. Since the CAJ industry imported large quantities of CAJ in 1993/94, stocks intended for domestic consumption should be at a high level.

Because stocks of CAJ are high, exports are forecast to increase slightly in 1994/95 to 40,000 tons and imports will decline by 10 percent to 24,000 tons.

Imported CAJ is controlled by the juice industry which reprocesses, refines, and blends it for domestic and export markets. Hungary, Poland, Romania, and Bulgaria supply the major share of CAJ imported by Austria.

As a result of the price reduction for CAJ and aggressive marketing, Austrian exports of CAJ to Japan have risen significantly. Japan is now Austria's most important export destination. Due to the large and cheap availability of cider apples, CAJ production was at a peak level in 1993/94. Because of this large cider crop coupled with the price decline during the same period, Austria's CAJ exports rose 73 percent in 1993/94.

Austria's accession to the EU on January 1, 1995 has opened another lucrative market for the Austrian juice industry which will no longer be subject to import duties. As a result, Austrian exports to the EU are forecast to increase in 1994/95.

Finally, exports to the United States are expected to decline in 1994/95 because of a weaker dollar.

Austria: CAJ exports (July-June)
(metric tons, 70/71 degree brix)

Market	1992/93	1993/94
Japan	5,100	13,500
Sweden	5,500	4,700
Germany	1,900	4,600
United States	3,400	3,700
United Kingdom	n/a	2,500
Netherlands	600	2,300
Belgium	500	1,900
Finland	1,000	900
Norway	1,400	600
Others	3,200	4,400
TOTAL	22,600	39,100

Source: USDA Attache reports

Austria: CAJ imports (July-June)
(metric tons, 70/71 degree brix)

Market	1992/93	1993/94
Eastern Europe	19,800	15,000
Poland	10,500	6,600
Romania	2,600	3,600
Hungary	3,700	2,800
Bulgaria	3,000	2,000
Italy	1,900	5,800
Russia	2,000	3,500
Switzerland	3,400	500
Others	2,200	1,800
TOTAL	29,300	26,600

Source: USDA Attache reports

Italian production forecast to fall slightly due to lower prices and competition from Eastern Europe.

Italian CAJ production is forecast to decline to 54,000 tons in 1994/95 because of high CAJ stock levels and increased competition from Eastern European countries. Most Italian CAJ production is exported with 67 percent shipped to Germany. Export prices to Germany were 3 German marks/liter in 1992/93 but only 1.3 marks/liter in 1993/94. The jump in exports during 1993/94 was attributed to the devaluation of the Lira.

For further information on CAJ production and trade, contact Casey Bean, (202) 720-4620, USDA's Horticultural and Tropical Products Division.

TABLE 1.
CONCENTRATED APPLE JUICE: PRODUCTION AND UTILIZATION IN SELECTED COUNTRIES (METRIC TONS AT 70/71 DEGREES BRIX)

Country/ Mkting Year 1//	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks
NORTHERN HEMISPHERE COUNTRIES							
Austria							
1992/93	4,850	23,000	29,300	57,150	22,600	8,800	25,750
1993/94	25,750	23,450	26,600	75,800	39,100	8,800	27,900
1994/95	27,900	16,200	24,000	68,100	40,000	9,000	19,100
France							
1992/93	0	22,300	4,600	26,900	5,000	21,900	0
1993/94	0	14,400	5,800	20,200	5,500	14,700	0
1994/95	0	17,000	5,200	22,200	6,000	16,200	0
Germany							
1992/93	37,230	90,394	186,726	314,350	82,910	121,475	109,965
1993/94	109,965	60,686	200,000	370,651	85,000	130,269	155,382
1994/95	155,382	60,000	150,000	365,382	90,000	140,000	135,382
Hungary							
1992/93	0	27,000	0	27,000	20,000	7,000	0
1993/94	0	33,000	4,000	37,000	30,000	7,000	0
1994/95	0	31,000	5,000	36,000	29,000	7,000	0
Italy							
1992/93	11,720	54,600	7,912	74,232	54,217	6,000	14,015
1993/94	14,015	55,000	9,800	78,815	68,800	5,000	5,015
1994/95	5,015	54,000	9,800	68,815	64,000	4,815	0
Mexico							
1992/93	0	21,800	500	22,300	19,500	2,300	500
1993/94	500	23,500	1,000	25,000	23,000	2,000	0
1994/95	0	21,800	1,000	22,800	20,300	2,500	0
Poland							
1992/93	0	98,000	0	98,000	77,000	21,000	0
1993/94	0	135,000	0	135,000	110,000	25,000	0
1994/95	0	80,000	0	80,000	60,000	20,000	0
Serbia and Montenegro							
1992/93	150	1,000	0	1,150	0	1,000	150
1993/94	150	900	0	1,050	0	900	150
1994/95	150	900	0	1,050	0	900	150
Spain							
1992/93	0	17,750	7,000	24,750	14,000	10,750	0
1993/94	0	15,500	1,500	17,000	4,500	11,000	1,500
1994/95	1,500	8,800	2,700	13,000	3,000	10,000	0
United States 2/							
1992/93	0	152,040	150,295	302,335	11,578	290,757	0
1993/94	0	146,612	208,548	355,160	7,997	347,163	0
1994/95	0	154,088	183,000	337,088	11,000	326,088	0
Subtotal							
1992/93	53,950	507,884	386,333	948,167	306,805	490,982	150,380
1993/94	150,380	508,048	457,248	1,115,676	373,897	551,832	189,947
1994/95	189,947	443,788	380,700	1,014,435	323,300	536,503	154,632

TABLE 1.
CONCENTRATED APPLE JUICE: PRODUCTION AND UTILIZATION IN SELECTED COUNTRIES
(METRIC TONS AT 70/71 DEGREES BRIX)

Country/ Mkting Year 1//	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1992/93	531	61,000	228	61,759	59,094	2,300	365
1993/94	365	57,000	0	57,365	55,000	2,230	135
1994/95	135	59,000	0	59,135	56,000	2,500	635
Australia							
1992/93	0	13,049	1,282	14,331	880	13,451	0
1993/94	0	15,612	1,278	16,890	943	15,947	0
1994/95	0	14,831	1,300	16,131	900	15,231	0
Chile							
1992/93	0	34,000	0	34,000	33,260	500	240
1993/94	240	30,000	0	30,240	29,600	500	140
1994/95	140	31,000	0	31,140	30,500	500	140
New Zealand							
1992/93	300	19,701	178	20,179	13,129	4,486	2,564
1993/94	2,564	17,304	437	20,305	16,069	4,236	0
1994/95	0	21,970	300	22,270	17,000	4,600	670
South Africa, Republic of							
1992/93	0	27,781	0	27,781	20,978	6,803	0
1993/94	0	24,634	0	24,634	20,000	4,634	0
1994/95	0	26,430	0	26,430	21,000	5,430	0
Subtotal							
1992/93	831	108,482	406	109,719	93,201	13,589	2,929
1993/94	2,929	145,987	1,719	150,635	125,209	25,051	375
1994/95	375	153,012	1,578	154,965	124,543	28,977	1,445
WORLD							
1992/93	54,781	616,366	386,739	1,057,886	400,006	504,571	153,309
1993/94	153,309	654,035	458,967	1,266,311	499,106	576,883	190,322
1994/95	190,322	596,800	382,278	1,169,400	447,843	565,480	156,077

Notes:

1/ Northern Hemisphere marketing years are July - June for all countries except Italy where the marketing year is January - December. Southern Hemisphere marketing year is January - December except New Zealand where marketing year is October - September.

2/ U.S. stock figures not available. CAJ production calculated by multiplying apple production data and percent juiced (1994/95 estimated by average juice share 1991/92-1993/94). Exports and imports based on U.S Department of Commerce data, with 1994/95 forecast based on trade data through January 31, 1995, industry information, and FAS/Washington analysis.

Sources: U.S. trade data from U.S. Department of Commerce, Bureau of Census.
USDA Attache reports and USDA/FAS estimates.
U.S. production and juice proportions from "Non-Citrus Fruits and Nuts, 1994 Preliminary" (January 1995--USDA/NASS)

Processed Tomato Products Situation and Outlook In Selected Countries

The production of processing tomatoes in selected countries in 1994 is estimated up 16 percent from a year earlier. Strong international demand and significantly large production in the United States were the reasons for this increase. U.S. exports of processed tomato products in marketing year (July-June) 1993/94 reached a record level for the seventh year in a row. Exports in 1993/94 reached 207,000 tons valued at $182 million, up 16 percent in volume and 19 percent in value from 1992/93. Exports first reached the 100,000 ton level in 1990/91.

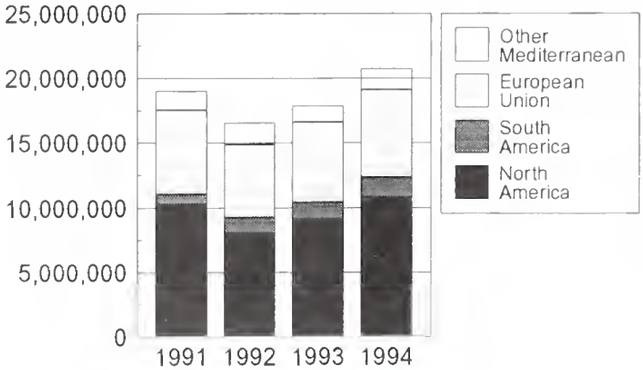
Summary

The production of tomatoes for processing in 1994, for 11 major producing countries, is forecast at 20.8 million metric tons, up 4 percent from an earlier forecast of 20.0 million, and up 16 percent from 1993. This upswing reflects mostly a 1.7 million ton increase estimated for the United States. Preliminary estimates for the Mediterranean producers indicate an increase of 13 percent over 1993 due to larger crops in Turkey, Spain, and Portugal.

Canned tomato production in 5 major producing countries in calendar year 1994 reached a record high of 1.8 million tons, up 6 percent from the previous year. Italian production accounted for 78 percent of the total volume, followed by Spain with 19 percent. France, Greece and Brazil made up the balance. There are no available statistics for canned production in the United States, but total production is believed to be the largest in the world.

Production of tomato paste in 9 major producing countries in 1994 totaled 1.2 million metric tons, up 11 percent from 1993. Production in the European Union (EU) countries accounted for 67 percent of the total production of these countries. Italy accounted for 38 percent of the EU's production, followed by Portugal with 19 percent, and Spain with 18 percent. Beginning tomato paste stocks from these 9 major producers declined for the third consecutive year, from 417,000 tons in 1992 to 389,000 tons in 1993, and to 278,000 tons in 1994. Exports of paste from these 9 countries remained fairly steady at the 800,000 ton-level for all three years. Statistics for U.S. paste production are not made available.

North America (Mostly the United States) Continues to Dominate World Processing Tomato Production
Metric tons



Source: Production Estimates and Crop Assessment Division, FAS, USDA

Processing Tomato Production in Selected Countries (1,000 Metric Tons)

Country	1991	1992	1993	1994	1995
North America					
United States	9,864	7,963	8,778	10,471	NA
Mexico	420	52	350	360	325
Total	**10,284**	**8,015**	**9,128**	**10,831**	**NA**
South America					
Brazil	760	707	670	770	840
Chile	NA	515	611	735	746
Total	**760**	**1,222**	**1,281**	**1,505**	**1,586**
Western Mediterranean					
Italy	3,400	3,200	3,500	3,400	NA
Greece	1,177 [1/]	966 [1/]	1,056 [2/]	1,020 [3/]	NA
Spain	872	768	894	1,210	NA
Portugal	706	447	501	866	NA
France	320	247	238	300	NA
Total	**6,475**	**5,628**	**6,189**	**6,796**	**NA**
Eastern Mediterranean					
Turkey	1,320	1,500	1,050	1,400	NA
Israel	168	161	203	230	NA
Total	**1,488**	**1,661**	**1,253**	**1,630**	**NA**
Total Mediterranean	**7,963**	**7,289**	**7,442**	**8,426**	**NA**
Grand Total	**19,007**	**16,526**	**17,851**	**20,762**	**NA**

[1/] Includes approximately 50,000 tons diverted to the fresh market. [2/] Includes approximately 30,000 tons diverted to the fresh market. [3/] Includes approximately 20,000 tons diverted to the fresh market.
Source: Production Estimates and Crop Assessment Division, FAS, USDA.

United States

Production of contract tomatoes for processing in the United States in 1994 is estimated at 10.5 million metric tons, up 19 percent from 1993. An 11 percent increase in harvested area to 137,676 hectares, and a record high yield of 76.3 tons per hectare accounted for the increase. Processing tomato yields have increased 40 percent since 1980 as a result of better varieties, improved crop management and handling, and the continued shift of acreage to California where yields are highest. California now accounts for 92 percent of the processing tomato area in the United States.

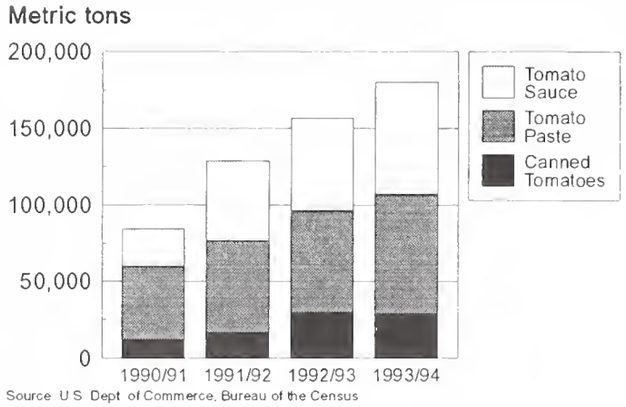
The United States is the world's largest producer of processed tomato products, with tomato concentrates (especially tomato paste, sauces and catsup) accounting for the majority of the products.

Wholesale prices for tomato paste (55 gallon drums) continued to decline in September, dropping below 40 cents per pound, compared with 44 cents in June and about even with the same month a year earlier. With current supplies increasing, prices will likely remain below a year earlier well into 1995. However, reportedly strong

demand for tomato products like pizza sauces and catsup will help temper any price decline. Also, catsup demand from fast food restaurants is expected to help maintain prices in the coming year.

According to the California Agricultural Statistics Service, California tomato processors intend to contract for more acreage in 1995 than the previous year. Demand is expected to continue strong in 1995.

U.S. Exports of Processed Tomato Products Continue to Increase



Source: U.S. Dept. of Commerce, Bureau of the Census

In marketing year (July-June) 1993/94, U.S. exports of tomato products totaled 208,000 metric tons valued at $182 million, up 108 percent in volume and up 92 percent in value from the level registered in 1990/91. Canada continues to be the top market for the United States. Exports to Canada in 1993/94 jumped from $45 million to $101 million. Exports to Mexico also increased dramatically. Other export markets registering significant increases in value during the same period included: Japan $22 million, up 69 percent; Korea, Rep. $6.9 million, up 44 percent; Taiwan $1.9 million, up 58 percent; Panama $1.1 million, up 294 percent; Colombia $1.0 million, up 834 percent; and Mexico $7.6 million, up 9 percent.

Mexico

Mexico's production of tomatoes for processing in 1994 has been revised downward to 360,000 tons from 370,000 tons forecast earlier. The early-season assessment of the 1995 crop, which will be harvested this spring, points to an outturn of only 325,000 tons, down 10 percent from 1994 because of reduced plantings. Total area planted to tomatoes for 1994/95 is estimated at 72,500 hectares, with 65,000 hectares for the fresh market and 7,500 hectares for processing. Area planted in Sinaloa, which produces about 35 percent of all tomatoes in Mexico, has been decreasing slightly in recent years because producers are using technological advances to achieve higher yields rather than increasing area. This is not the case for other producing states.

Technological advances such as the use of plastic ground covers and drip irrigation systems continue to gain acceptance. While use is still limited in relation to overall production, these techniques do help control diseases, lower chemical costs, and increase yields.

Northwestern Mexico produces about one third of the fresh tomatoes and all of the processing tomatoes in Mexico. The winter crop is predominantly produced in the states of Sinaloa, Michoachan, Baja California and Sonora. The summer crop is more widespread, with the predominant states being San Luis Potosi, Baja California, Sinaloa, and Morelos.

Tomato paste accounts for the bulk of Mexico's processed tomato production. Tomato paste production in 1994/95 (March to February) is estimated at 54,000 tons, up 3 percent from 1993. Traditionally, exports account for over 80 percent of Mexico's total paste production. The primary market for Mexican tomato paste continues to be the United States, followed by Canada and Japan.

Eight tomato paste processing plants continue to operate in Mexico. The majority of these plants are located in the state of Sinaloa, and operate from March to June. These plants are controlled by both Mexican and multi-national firms who produce paste under their own labels and for use in other products such as catsup, sauce, hot sauce, sardines, and other paste products. The total processing capacity for paste production in

Sinaloa ia approximately 6,350 tons of tomatoes per day. Most of the tomatoes for processing are contracted by the processors directly with local growers. If additional produce is needed, tomatoes are purchased on the cash market. Tomato paste is made at different concentrations depending on the use: 29, 31 and 44 degrees brix.

Brazil

Production of tomatoes for processing in 1994 is forecast at 770,000 tons compared with an earlier forecast of 930,000 tons. This decrease in production was due to losses caused by scattered frosts in June and July and a drought in August and September. Processed production in 1995 is forecast at 840 ,000 tons, up 9 percent from the revised 1994 level.

Processing tomato production is carried out under contract between growers and processors. In Brazil, the principal factor affecting planted area of processing tomatoes is price.

Tomatoes are produced in all states of Brazil. The major regions where tomatoes for processing are grown are Sao Paulo, the Sao Francisco River Valley in the Northeast, and the Cerrado regions of Goias and Minas Gerais States. The central and southern regions harvest tomatoes from June to November, while the northeast region harvests tomatoes from May to October.

In Brazil, tomato processors extend technical assistance, credit, as well as certified seeds to growers. In this way, processors have supply guaranteed, and growers have a guaranteed market and price for their crop. The required investment in tomato production for processing tomatoes is estimated at about U.S. $2,500 per hectare. A substantial number of growers of processing tomatoes irrigate their crop, mostly in Sao Paulo, Goias, Minas Gerais, Bahia and Pernambuco. The cost of irrigation equipment is estimated at about U.S. $1,500 per hectare.

In 1994, yields of tomatoes for processing are estimated at 43 tons per hectare in Sao Paulo and 55 tons per hectare in Goias.

Brazil's annual production of tomato products includes: tomato puree (17 to 18 percent TSS) accounting for about 50 percent of total processed production; tomato paste (26 percent TSS), accounting for about 30 percent of the processed production; and tomato sauce, catsup and juice accounting for the balance of production.

There are four major processing tomato plants that produce approximately 76 percent of the tomato extract; 97 percent of the tomato pulp and puree; and 94 percent of the tomato sauce.

According to Brazilian tomato processors, product yields average as follows: 4.5 kilograms of fresh tomatoes are used to produce one kilogram of paste; 2.5 kilograms of fresh tomatoes are used to produce one kilogram of puree; and 2.5 to 2.7 kilograms of fresh tomatoes are use to produce one kilogram of tomato sauce.

The average price of tomatoes paid by the processing industry to growers during 1994 was equivalent to about U.S. $59.00 per ton in the northeast and U.S. $65.00 per ton in Sao Paulo.
In 1993, Brazil's exports of tomato products were valued at almost U.S. $20.0 million. The primary markets were Argentina, Paraguay, Canada, Dominican Republic, and Uruguay. Brazil's imports of tomato products during calendar year 1993 were valued at about U.S. $42 million, with tomato paste accounting for 76 percent of the total value.

Chile

Chile's production of tomatoes for processing in 1994 is estimated at 735,000 tons compared with 711,000 tons forecast earlier. The current estimate is 20 percent above last year's level, due mainly to an increase in planted area.

Chile's output of processing tomatoes has expanded rapidly over the last decade, principally as a result of strong international demand for tomato paste. Chile's excellent climate for tomato growing was another important factor in the dramatic growth in planted area and production. However, planted area is not expected to expand much further in the coming years because of

constraints on both production and exports. Yearly variation in planted area for processing tomatoes will depend on weather conditions and the ability of the tomato industry to sign contracts with farmers similar to those for alternative crops like sugarbeets, tobacco and others. Secondly, the industry is currently operating at near production capacity and there are no signs of any imminent expansion of total capacity.

Tomatoes in Chile are planted from mid-September through early December of each year and harvested from around January 10 through April 15. For the planting season, frosts are an important limiting factor.

Tomato output has increased as a result of higher yields and expansion of planted area. Through advanced cultural practices, the development of new varieties and the use of hybrid seeds, yields have risen to an average of almost 70 metric tons per hectare.

The current installed capacity in Chile is about 95,000 to 100,000 tons. There are 8 major tomato processing plants, 6 of which have a production capacity of 10,000 tons or more.

Chile's processed tomato industry is composed mainly of tomato paste and canned tomatoes, whole-peeled, diced-peeled and crushed.

The tomato industry in Chile produces mostly a 30 to 32 degree brix product. However, small amounts of paste slated for the Japanese market are produced at 28 to 30 brix.

Chile's processed tomato usage is fundamentally a residual of exports. The only possible exception is paste, where industry sources point to the dramatic increase in consumption of tomato products used in fast-food and pizza industry.

Tomato paste accounts for the bulk of Chile's tomato product exports. In 1994, tomato paste exports totaling 70,500 tons accounted for approximately 84 percent of total production. In 1993, Brazil (39 percent), Japan (20 percent), and Argentina (16 percent) accounted for 75 percent of the tomato paste exports. Exports of canned tomato products in 1993 totaled 23,000 tons. Argentina, Japan and Brazil were the major markets. There are no imports of tomato products into Chile.

Mediterranean Area

European Union

The 1994 harvest of tomatoes for processing in the major producing countries of the European Union (EU) is estimated at 6.8 million metric tons, up 10 percent from 1993 due mostly to larger crops in Spain and Portugal. The 1994 EU support price for processing tomatoes was reduced 6 percent to 8.028 ECU per 100 kilograms net based on a total solids content in tomatoes of 4.8 to 5.4 percent. Prices are adjusted to solids content as follows: minus 5 percent when total solids content is between 4.8 to 5.0 percent, and by plus 5 percent when total solids content exceeds 5.4 percent. There was no change in the overall EU production quota, which remained at the 1992 level of 6.6 million tons.

Italy

Italian tomato production for processing in 1994 is estimated at 3.4 million tons, unchanged from the level forecast earlier, but down 3 percent from 1993. High temperatures during last summer's peak producing season had little effect on the tomato crop. Despite hot temperatures, fruit quality was reported very good. According to the Italian Tomato Product Industry Association, tomatoes processed during 1994 processing season, August and September, slightly exceed Italy's 3.3 million ton quota. A significant change in the composition of the market is expected in terms of product share. Tomato paste production estimated at 300,000 tons for 1994 is down 8 percent from the previous year; while canned tomato production for the same period is preliminarily set at 1.4 million tons, up 2 percent from the volume registered in 1993.

The increase in canned tomato production is due to increased consumer interest in new canned tomato products, such as crushed and diced tomatoes and tomato pulp. Demand for tomato paste, on the

other hand, is declining. Consumption of traditional canned whole tomatoes is also stagnant.

In general, official tomato paste production numbers used in the PS&D table are believed to be inflated, due to overzealous processor claims. However, since no reliable estimates reportedly exist regarding the extent of such claims, government production numbers are used in subsequent PS&D tables. However, during the 1993/94 marketing year, trade sources confirmed there were no canned tomato paste stocks available. The amount of paste production suspected of being over declared over the last several years is estimated at 274,000 tons. In order to eliminate the phantom stocks that have accumulated over the years due to suspicious production claims and the rollover stock numbers, zero was used for 1993/94 ending stocks and the complete PS&D table for 1993/94 was left unbalanced.

Beginning tomato paste stocks are believed to be zero in 1994. However, beginning canned tomato stocks are estimated at 134,000 tons. Canned stocks were not affected like canned tomato paste stocks, since, canned tomatoes are produced in the north where over reporting of industry stocks is less prevalent.

In 1994, Italian exports of canned tomatoes totaled 660,000 tons accounting for 47 percent of total production. During the same period, tomato paste exports totaled 240,000 tons which accounted for about 80 percent of total paste production.

Portugal

The 1994 Portuguese production of tomatoes for processing increased by 73 percent to 865,775 metric tons. This increase was due to both an expansion in area planted and unusually high yields. The bulk of Portugal's tomato processing consists of tomato paste production. Tomato paste production for the second time since the 1986 EU-Accession surpassed the national quota. Production of other tomato products consists mostly of diced tomatoes (peeled or unpeeled), and crushed tomatoes.

Average tomato yields were up by 25 percent to 62 metric tons per hectare, and averaged over 100 metric tons per hectare in Ribatejo area. This was mainly due to extremely good weather patterns, with constant mild temperatures in July resulting in below average plant water losses. Additionally, the increasing use of drip irrigation systems has also contributed to higher plant moisture levels.

The 1994 crop year was also marked by considerable changes at the farm level. The traditional small "seareiros" were to a large extent displaced by larger production units, as farmers shifted area formerly planted to corn into tomato production. Drip irrigation and mechanical harvesting were utilized on 60 and 25 percent of the total area, respectively, while direct-seeding was employed on some 600 hectares. Producer associations also began to take on a relevant role in marketing. There are currently four producer associations, of which two were established in 1993 and one in 1994. These associations play a chief role in marketing their members' production to the leading tomato processors.

Further modernization efforts are expected in the future. Larger landholdings are expected to contribute significantly to higher tomato production as more farmers move away from corn as a result of Portugal's transition in the grains sector (to be fully harmonized with the EU by 2003).

Portugal's tomato processing industry remains very weak financially, still reeling from estimated losses of $60 to 80 million over the last 3 years. Twelve tomato processors were in operation in 1994, of which only 3 are turning a profit. Despite a slight financial improvement anticipated for 1994/95, more bankruptcies seem inevitable. The most serious macroeconomic problems facing the sector include exchange rate fluctuations, which affect exports of paste, as well as high interest rates on bank loans. The industry has become very concentrated in recent years. Three factories account for more than 50 percent of Portugal's total paste output.

Owing to a slight recovery in international demand, Portuguese tomato paste exports are expected to be up in 1994/95. The EU will continue as Portugal's major export destination, and this market is expected to grow with EU accession of Sweden, Finland, and Austria. Sales to the Far and Middle East will tend to remain relatively stable. A partial recovery of the Former Soviet Union market is possible, given the effects of an export credit guarantee line, which is scheduled to be implemented next year. This reportedly would help some of the traditional tomato units which are currently unable to sell their tomato paste in 5 kilogram tin drums, the old USSR's prime import item.

Greece

The 1994 production estimate for tomatoes for processing in Greece has been revised downward to 1.02 million tons from an earlier forecast of 1.1 million tons. Unusually high temperatures and dry weather in August favored the development of mites. The mites caused considerable defoliation of the tomato plants, which resulted in a lower brix content and hardening of the fruit.

The 1994 tomato paste production estimate has been revised down to 160,000 tons from an earlier forecast of 179,500 tons. The current estimate includes 156,000 tons of tomato paste (converted to 28-30 percent TSS), with a balance of 4,000 tons of tomato juice and passata converted to the same concentration. Tomato juice and passata production figures are included in the total paste production since the National Statistical Service reports foreign trade data under the heading of "tomato pastes" in three groups of products: a) below 12 percent TSS concentration; b) between 12-30 percent TSS; and c) over 30 percent TSS.

Spain

Production of tomatoes for processing in Spain in 1994 is currently estimated at 1.2 million tons, up 35 percent from the 894,000 ton crop harvested in 1993. Despite a drought throughout Spain's tomato-producing areas, total area planted to processing tomatoes was up 25 percent from 1993. Minimal stocks of processed product resulted in increased prices paid to tomato growers, which stimulated production.

Canned tomato production in 1994 totaled 380,000 tons, up 44 percent from 1993. Tomato paste production during the same period was 143,000 tons, up 28 percent from 1993.

Consumption of tomato products in Spain continues at a steady growth rate. This is encouraging processing plants to enlarge their processing capacity. Spain's total raw tomato processing capacity which includes peeled, whole or in pieces, crushed, etc. is about 500,000 tons annually.

Turkey

Production of tomatoes for processing in Turkey in 1994 has been revised slightly to 1.4 million tons from an earlier estimate of 1.5 million tons. Approximately one fourth of the total Turkish tomato production is industrial (processing) tomatoes.

Warmer than usual weather conditions and lack of rains during the tomato growing season affected the crop size. Large tomato paste plants in the Marmara Region, which usually work 75 days in the season, worked only 45 days in 1994 due to the smaller supply of industrial tomatoes available.

Turkey has an annual tomato paste production capacity of 370,000 tons, the second largest in Europe after Italy with 400,000 tons capacity. Strong competition in export markets has prevented a higher utilization of local processing capacity. Approximately 54 percent of total capacity was utilized in 1994. Home production in the past equaled almost one-half of total tomato paste production. In 1994, an estimated 20,000 tons of home paste was produced.

Israel

The production forecast for processing tomatoes in Israel in 1994 is maintained at 230,000 tons, up 13 percent from 1993.

The planted area for processed tomatoes in 1994 is estimated at 2,900 hectares, compared to 2,100 hectares in 1993. The main producing areas are the Jezreel Valley (35 percent), Golan Heights (25 percent), and Western Galilee (15 percent).

The main products of the processing industry are whole and diced peeled tomatoes, tomato paste, puree, tomato juice, ketchup and pizza sauces. Most of the Israeli tomato processing plants produce the whole range of tomato products, while some specialize in one or two products.

France

Production of processing tomatoes in France in 1994 remains unchanged from the earlier forecast of 300,000 tons. This represents an increase of 26 percent over 1993 when yields in several regions were reduced by hailstorms, heavy rains, and flooding.

In 1994, deliveries of fresh tomatoes to be processed into tomato paste rose 20 percent from the previous year to 205,836 metric tons. French tomato paste production in 1994 is estimated at 39,000 tons, net weight.

Domestic consumption of tomato paste in France in 1994 continued to remain at around 70,000 tons with no expected change in 1995.

The EU quota for French processed tomato production remained unchanged at 392,404 tons in 1994/95 and is not expected to change for 1995/96. The French processed tomato quota is broken down as follows: 278,691 tons for tomato paste; 73,628 tons for whole peeled tomatoes; and 40,087 tons for other production.

France continued to be a net importer of tomato paste in 1994. During this same period France imported 35,000 tons of tomato paste. Italy remained France's main supplier of tomato paste from January to September 1994, accounting for over 50 percent of total paste imports. Currently, there are no imports of tomato paste from the United States.

For information on tomato products, contact Emanuel McNeil at (202) 720-2083. For marketing opportunities, contact Stacey Peckins at (202) 690-1341. For information on tomato production, contact Kelly Strzlecki at (202) 720-6791.

Canned Tomatoes: Production, Supply, and Distribution in Selected Countries
Metric Tons Net Weight; Including whole peeled, and/or wedged, diced, crushed, and other non-concentrated products; Preliminary 1993/94, Forecast 1994/95

Marketing Year [1/]	Beginning Stock	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stock
France							
1992/93	10,392	31,546	82,726	124,664	3,655	117,025	3,984
1993/94	3,984	45,319	79,420	128,723	4,500	120,000	4,223
1994/95	4,223	46,000	80,000	130,223	5,000	122,000	3,223
Greece							
1992/93	3,553	16,677	7,020	27,250	4,998	19,000	3,252
1993/94	3,252	23,467	6,000	32,719	8,000	21,000	3,719
1994/95	3,719	23,500	5,000	32,219	8,500	21,000	2,719
Italy							
1992/93	315,000	1,228,000	0	1,543,000	466,000	830,000	247,000
1993/94	247,000	1,367,000	5,000	1,919,000	650,000	835,000	134,000
1994/95	134,000	1,400,000	5,000	1,539,000	660,000	840,000	39,000
Spain							
1992/93	18,000	200,000	100	218,100	34,000	169,100	15,000
1993/94	15,000	250,000	100	265,100	55,000	176,100	41,000
1994/95	34,000	347,000	100	381,100	75,000	181,100	125,000
Brazil							
1992/93	0	21,000	517	21,517	1,630	19,887	0
1993/94	0	27,500	813	28,313	4,144	24,169	0
1994/95	0	10,000	334	10,334	1,963	8,371	0
Total							
1992/93	346,945	1,497,223	90,363	1,934,431	510,283	1,155,012	269,236
1993/94	269,236	1,713,286	91,333	2,373,855	721,644	1,176,269	182,942
1994/95	175,942	1,826,500	90,434	2,092,876	750,463	1,172,471	169,942

Source: U.S. Agricultural Attache Reports. [1/] Marketing years are July-June with the exception of France's which is August-July, and Brazil's which is May-April. Note: For calendar year reference, MY 1992/93 would become CY 1992.

Tomato Paste: Production, Supply, And Distribution In Selected Countries
Metric Tons Net Weight, 28-30 Percent TSS Basis

Marketing Year [1/]	Beginning Stock	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stock	
France								
1992/93	14,311	35,266	38,854	88,431	2,229	74,954	11,248	
1993/94	11,248	32,435	34,203	77,886	3,874	70,749	3,263	
1994/95	3,263	39,000	35,000	77,263	3,000	70,000	4,263	
Greece								
1992/93	57,142	162,983	1,138	221,263	209,634	10,500	1,129	
1993/94	1,129	186,764	3,500	191,393	178,000	10,500	2,893	
1994/95	2,893	160,000	4,000	166,893	155,000	10,500	1,393	
Italy								
1992/93	126,000	301,000	47,000	474,000	200,000	76,000	198,000	
1993/94	198,000	325,000	46,000	569,000	220,000	75,000	0	[2/]
1994/95	160,000	300,000	45,000	345,000	240,000	74,000	31,000	
Portugal								
1992/93	52,170	84,559	0	136,729	98,726	17,000	21,003	
1993/94	21,003	96,289	0	117,292	88,307	22,000	6,985	
1994/95	6,985	153,662	0	160,647	130,000	25,000	5,647	
Spain								
1992/93	33,000	94,300	2,500	129,800	52,800	49,000	28,000	
1993/94	28,000	111,600	1,500	141,100	69,000	52,100	20,000	
1994/95	20,000	143,000	1,000	164,000	73,000	55,000	36,000	
Total EU								
1992/93	282,623	678,108	89,492	1,050,223	563,389	225,554	243,377	
1993/94	259,380	752,088	85,203	1,096,671	559,181	504,349	33,141	
1994/95	193,141	795,662	85,000	913,803	601,000	234,500	78,303	
Turkey								
1992/93	125,000	230,000	5,367	360,367	156,158	75,209	129,000	
1993/94	129,000	150,000	931	279,931	117,219	78,712	84,000	
1994/95	84,000	200,000	0	284,000	114,000	80,000	90,000	
Chile								
1992/93	9,030	99,570	0	97,600	84,868	11,700	1,032	
1993/94	1,032	76,250	0	77,283	63,968	12,150	1,164	
1994/95	1,164	83,000	0	84,164	70,500	12,800	864	
Mexico								
1992/93	0	7,800	8,000	15,800	7,800	8,000	0	
1993/94	0	52,500	0	52,500	46,000	6,500	0	
1994/95	0	54,000	0	54,000	47,500	6,500	0	
Brazil								
1992/93	0	33,000	5,370	38,370	6,862	31,508	0	
1993/94	0	40,000	32,000	72,000	17,000	55,000	0	
1994/95	0	56,000	32,000	88,000	18,000	70,000	0	
Grand Total								
1992/93	416,653	1,048,478	108,229	1,562,360	819,077	351,971	373,409	
1993/94	389,412	1,070,838	118,134	1,578,385	803,368	382,711	118,305	[2/]
1994/95	278,305	1,188,662	117,000	1,423,967	851,000	403,800	169,167	

Source: U.S. Agricultural Attache Reports. 1/ Marketing years are July-June with the exception of France's which is August-July, Brazil's which is May-April, and Mexico's which is March-February. 2/ See text on Italy for explanation why table does not balance. Note: For calendar year reference, 1992/93 MY would become 1992 CY.

U.S. Exports of Tomato Products [1/]
(Metric Tons)

Country	1990/91	1991/92	1992/93	1993/94
Canada	45,442	79,323	109,169	112,418
Japan	18,414	23,703	16,310	24,845
Mexico	3,111	14,613	10,842	11,731
Korea, Rep.	7,430	3,919	5,556	8,679
Australia	476	501	1,841	8,266
Hong Kong	6,081	5,629	7,944	6,114
United Kingdom	3,993	1,456	2,087	4,952
Philippines	370	3,326	4,385	3,856
Saudi Arabia	2,145	2,493	2,193	2,467
Taiwan	694	732	1,387	2,287
Dominican Rep.	54	199	2,062	1,773
Netherlands	3,713	2,016	2,303	1,388
Panama	118	65	300	1,333
Colombia	14	78	138	1,126
Russian Fed.	0	0	220	1,078
Kuwait	49	586	1,176	1,044
Honduras	18	1,046	1,284	1,022
Others	8;188	10,812	10,871	13,296
Grand Total	**100,290**	**150,497**	**180,068**	**207,675**

[1/] Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.
Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2002100000, 2002900060, 2002900080, 2103202000 and 2103204000.

U.S. Exports of Canned Tomatoes, Tomato Paste, and Tomato Sauce
MY 1990/91-1993/94 [1/]
(Metric Tons)

Commodity/ Country	1990/91	1991/92	1992/93	1993/94
Canned Tomatoes:	**11,505**	**16,543**	**29,154**	**28,830**
Canada	7,263	10,553	21,032	20,680
Japan	963	1,712	2,755	2,703
Australia	26	428	510	1,855
Honduras	0	643	1,038	658
Mexico	323	846	521	392
Korea, Rep.	123	97	349	321
Hong Kong	302	129	230	230
Singapore	240	288	166	196
Malaysia	140	169	170	168
Others	2,125	1,678	2,383	1,627
Tomato Paste:	**47,865**	**59,859**	**66,811**	**77,814**
Canada	26,767	32,427	46,004	43,168
Japan	9,934	9,560	3,835	8,247
Australia	405	0	1,246	6,332
Korea, Rep.	4,691	3,427	4,638	4,800
Philippines	235	2,570	3,517	3,676
Mexico	475	7,071	1,792	2,886
Dominican Rep.	0	110	1,436	1,366
Panama	2	14	108	1,057
Others	5,356	4,680	4,235	6,282
Tomato Sauce:	**25,162**	**52,173**	**60,664**	**73,735**
Canada	10,414	34,594	40,721	47,350
Mexico	1,693	3,640	6,029	5,871
Japan	3,079	6,706	4,871	4,878
United Kingdom	2,949	316	977	4,763
Netherlands	656	704	720	1,215
Korea, Rep.	1,683	131	397	1,116
Saudi Arabia	1,030	1,589	439	893
Kuwait	19	265	675	536
Others	3,639	4,228	5,835	7,113

[1/] Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.

U.S. Imports of Canned Tomatoes [1/]
(Metric Tons)

Country	1991/92	1992/93	1993/94
Italy	11,649	15,715	16,961
Spain	1,902	1,156	5,816
Others	0	54	55
Total European Union	13,551	16,925	22,832
Argentina	1,527	678	0
Brazil	237	380	411
Chile	13,581	16,898	11,541
Others	0	19	2
Total South America	15,345	17,975	11,954
Canada	842	827	1,716
Israel	12,361	7,927	11,810
Turkey	1,927	2,468	2,020
All Others	1,228	286	860
Grand Total	45,254	46,408	51,192

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following (HTS) Harmonized Tariff Schedule commodity codes: 2002900050, 2002100020, 2002100040, 2002100050, and 2002100090.

U.S. Imports of Tomato Sauce 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94
Italy	613	195	200
Chile	1,252	1,357	289
Canada	638	3,200	2,982
Dominican Rep.	1,205	1,463	827
China, People's Rep.	0	0	430
Others	389	165	369
Grand Total	4,097	6,380	5,097

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2103204020 and 2103204040.

U.S. Imports of Tomato Paste and Puree [1/]
(Metric Tons)

Country	1991/92	1992/93	1993/94
Mexico	10,791	20,312	28,428
Chile	8,134	7,789	6,576
Canada	0	1,439	5,346
Italy	791	1,025	1,352
Israel	1,948	776	1,330
Spain	132	332	1,308
Others	2,502	2,088	1,859
Grand Total	24,298	33,761	46,199

[1] Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2002900010, 2002900030, and 2002900040.

U.S. Imports of Ketchup 1/
(Metric Tons)

Country	1991/92	1992/93	1993/94
Canada	53	186	397
Chile	52	4	0
Others	20	40	17
Grand Total	125	226	414

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census. Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2103202000.

Effects Of the Mexican Peso Devaluation On Winter Vegetable Trade

The devaluation of the Mexican peso over the past ten weeks has rapidly improved the economic situation of the Mexican winter vegetable farmer producing vegetables for the export market, mainly the United States, according to the U.S. Agricultural Counselor in Mexico City. Exports of winter vegetables to the United States were actually a bit lower during December and January than they were a year earlier, but picked up sharply in February, particularly in the case of tomatoes, due to exceptionally good yields in the major exporting regions of Sinaloa and the devaluation of the peso. Heavy shipments of tomatoes in mid-February caused an oversupply in export marketing channels, leading to a concerted effort by commercial producers to reduce market offerings.

As a result of the Mexican peso devaluation, the peso prices received by Mexican vegetable growers are dramatically higher in 1995 than they were last year, and still rising as the peso/dollar exchange rate climbs past 7 to 1. Reportedly, winter vegetable exports to the United States are expected to exceed last year's exports by about 15 percent. The increase is constrained because most of Mexico's winter vegetable crops were planted before devaluation, more or less fixing total availability, and by the absorptive capacity of the mature U.S. market.

In the case of vegetables being grown for the U.S. frozen food market, grower contracts negotiated last summer and fall have largely defined the amount that would be produced; there is little output of crops such as broccoli, which can be readily diverted from Mexican domestic use into export channels.

Reportedly, tomatoes have been an exception to the general pattern of moderate export growth. Shipments are up more than 40 percent compared to a year ago, totaling 140,120 metric tons from November 15, 1994 to February 15, 1995. This surge in exports--occurring mostly in February--reflected unusually favorable growing conditions (production 15 to 20 percent above expectations), providing an additional "kicker" to the windfall profit received for a crop largely grown within the pre-devaluation Mexican cost structure. The unexpectedly large tomato crop caused a sharp drop in local market tomato prices, along with the surge in exports.

Heavy Mexican production in February led to a temporary glut in nearby export markets, with a reported backlog of roughly 300,000 boxes in Nogales. As export prices per box dropped to as little as $3.00 per box, Sinaloa producers stopped harvesting for three days in mid-February, so as to relieve pressure on the U.S. market. The Mexican press also reported the dumping of several thousand tons of fresh tomatoes not worth packing and shipping at those depressed prices. By the end of February, the export price had reportedly recovered to $5.00 to $7.00 per box, compared to roughly $4.00 per box last year.

The main fresh winter vegetables that are exported from Mexico to the United States are tomatoes, bell peppers, and cucumbers, followed by zucchini and eggplants. Exporters consider that current U.S. prices are excellent, except for jalapeno peppers (a crop for which U.S. yields generally exceed yields achieved in Mexico). Cucumber exporters report sales in February at $10.00 to $16.00 a box (one and one-eighth bushels), compared to a common price of $8.00 to $10.00 a box. In peso terms, the 1995 price of cucumbers at the top end of the quality scale has been three times the level Mexican exporters

received in 1994.

Growers of horticultural crops anticipate a sharp rise in production costs over the next year. Imported inputs (fertilizers, seeds, pesticides) have seen a 40 to 60 percent cost increase, and these items represent about one third of the cost of production for a crop like tomatoes. Production credit was expensive before devaluation; now banks are asking for a 70 percent annual interest rate, or more, if they are willing to provide loans at all. Producers in Sinaloa, for example, were given credit based on government bonds. Interest rates on these instruments more than doubled during the last two months. Producers are estimating that the cost of production for winter vegetables could rise by as much as 35 to 38 percent between now and next fall, but this estimate may be conservative.

U.S tomato growers are quite concerned with the large surge in imports of tomatoes from Mexico over the last several weeks and the negative impact on U.S. market and grower prices.

Under the NAFTA safeguard provision designed to protect U.S. growers against surges in imports, the tariff rate quota (TRQ) for imports of fresh tomatoes entering the United States for the period November 15, 1994 to February 28, 1995, was 172,300 metric tons, with a duty at 2.6 cents per kilogram. As of February 26, 1995, a total of 141,714 tons or 82.2 percent of fresh tomatoes had entered the United States from Mexico. By March 5, 1995, 100 percent of the TRQ were filled, and an additional 12,239 metric tons of fresh tomatoes entered at the higher MFN rate of 4.6 cents per kilogram.

The TRQ for imports of fresh tomatoes entering the United States for the period March 1, 1995 to July 14, 1995 is 170,465 tons with a duty of 3.6 cents per kilogram. As of March 5, 1995, only 68 tons had entered the United States from Mexico.

The current in-quota duty rates reflect a reduction of 20 percent from the pre-NAFTA rates of 3.3 cents per kilogram for November 15 to February 28 and 4.6 cents per kilogram for March 1 to July 14.

The annual MFN rate for fresh tomatoes entering the United States for the period of July 15 to August 31 is currently 2.6 cents per kilogram and for the period September 1 to November 14 is 3.6 cents per kilogram.

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European Union Imports of Horticultural Products in 1993

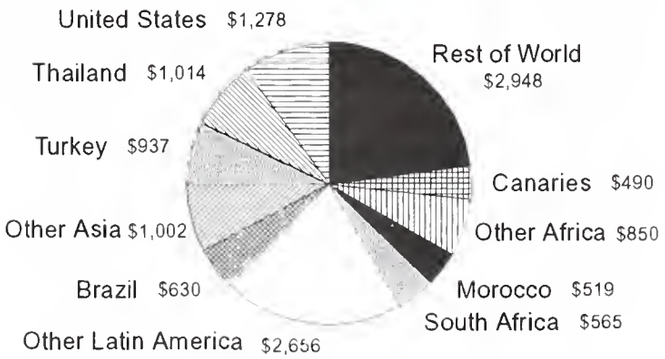
The European Union (EU) has a relatively restrictive trading regime in horticulture when compared to the United States. High tariffs, import licensing restrictions, countervailing charges, minimum import price regulations, and variable duties are in place for many imported horticultural products. However, tariff and other concessions from the GATT Uruguay Round will improve market access and eliminate these non-tariff barriers. Horticultural imports from the United States amounted to $1.28 billion in 1993, somewhat lower than in 1992. This amount was about 10 percent of the EU-12's imports, making the United States the largest third country supplier of horticultural products to the EU. Thailand was the second largest third country supplier, with $1.01 billion. Turkey was the third largest third country supplier with $937 million. The outlook for U.S. exports to increase is good -- improved market access should help make U.S. products more competitive, especially when EU production is at normal or below normal levels.

Total horticultural imports by the member states of the then 12 member European Union (EU-12) from all non-EU countries totalled $12.9 billion in 1993, an 11 percent decrease in dollar terms from 1992. Imports from the United States, the leading supplier, totalled $1.28 billion, a 10 percent decline.[1] The continuing recession in Europe, as well as the recovery of many EU crops from a poor harvest the previous year, are the principal reasons for the decline.

This level of imports gives the United States a 9.9 percent import market share among all non-EU sources. This is up somewhat from the 9.4 percent market share of 1992.

Because several member states no longer collect trade statistics on intra-Union trade, it was impossible to calculate the market share that the United States had for EU horticultural imports including intra-Union imports in 1993. The Netherlands and Germany no longer collect these statistics. Still, the vast majority of horticultural imports come from other EU member states. A key reason why most trade in horticulture is with other members states within the EU is the high level of protection domestic producers have from imports.

The U.S. is the Leading Non-EU Supplier But Imports Come from All Over the World



Source: Eurostat

1993
Value in $ Millions

[1] U.S. export statistics for 1993, however, indicated a 2 percent increase over 1992 to $1.33 billion. Calculation of the various EU currencies back into U.S. dollars may account for the difference. U.S. horticultural exports to the EU-12 in 1994 indicate another increase, to $1.44 billion, up 11 percent over 1993.

Effective January 1, 1995, three countries, Austria, Finland, and Sweden, acceded to the European Union. With relatively low populations (8 million, 5.1 million, and 8.7 million, respectively) but high incomes, this enlargement promises to boost U.S. horticultural exports to the EU, but may result in reduced U.S. access to those three countries as many products will have higher tariff rates. Single market rules on phytosanitary standards and labeling requirements may offset some of the negative tariff effects. For further information on this issue, see FHORT 11-94.

Myriad Restrictions In Place Against Horticultural Imports

The EU has a much more restrictive trading regime than does the United States. While the United States has relatively low tariffs for fresh fruit and vegetables (averaging around 5 percent ad valorem equivalent), the EU has very high seasonal duties for fresh produce. High-season tariffs include 18 percent for tomatoes, 17 percent for cauliflower and beans, 22 percent for grapes, 14 percent for apples, and 16 percent for strawberries. Processed fruit and vegetable tariffs are typically much higher, with most frozen vegetables having an 18 percent tariff, ad valorem, most frozen fruit having tariffs ranging from 15 to 26 percent, and most processed fruit and vegetable product tariffs over 20 percent.

Often tariffs are not the only entry barrier for horticultural imports. In addition, many products face so-called countervailing charges, which are tariff surcharges based on the difference between the import price and a reference price set by EU authorities that reflects the domestic producer price. There are also import licensing restrictions, minimum import price regulations, and variable duties for many horticultural products. These measures help protect the domestic producer by keeping out low-priced imports and controlling supply.

Tariff rate quotas are in place on almonds, certain oranges, lemons, dried onions, bananas, preserved mushrooms, and some orange juice.

Variable levies are in place for fresh olives, preserved olives, fresh sweet corn, frozen sweet corn, canned sweet corn, certain frozen berries, preserved fruit, certain processed potatoes, many citrus juices, grape juice, apple juice, and pear juice. These will be replaced by fixed tariffs starting in July 1995.

Minimum import price or reference price regulations are in place against apples, apricots, artichokes, cherries, clementines, cucumbers, eggplant, endive, grapes, lemons, oranges, peaches, pears, plums, tomatoes, raisins, certain nursery products, and many other fruits and vegetables. These are being phased out or replaced by special safeguards, starting in July 1995. (See section on Uruguay Round, below.)

To lessen the impact that its import restrictions would otherwise have on developing countries, the EU also provides import preferences to certain developing countries for specific products. Countries that were formerly colonies or dependencies of the member states are the major beneficiaries. In addition, North African and East Mediterranean citrus producers get preferential treatment, and Eastern European producers of many fruits and vegetables also get preferential terms of trade.

In addition to import measures, the EU provides substantial domestic support to its fruit, vegetable, and tree nut producers. It has a Tree Nut Program, a Dried Fruit Regime, and a Banana Regime, to name just a few of the production support and supply control mechanisms.

Potato producers get support from the individual member state governments, as well as export subsidies. Wine producers receive extensive export subsidies, as well as other financial support intended to control supply and prop up prices. Price supports exist for raisins/sultanas, dried prunes, and many other products in the fruit and vegetable sector.

Despite all of these measures, the United States is the EU's leading supplier of tree nuts and dried fruit, and a major supplier of fresh deciduous fruit and citrus.

Uruguay Round Concessions Will Help

The schedule of tariff concessions resulting from the Uruguay Round of the General Agreement on Tariffs and Trade (GATT) indicate that tariffs for many products important to U.S. horticultural exporters will go down. The EU is reducing all tariffs a minimum of 20 percent over the next six years.

Tree nut tariffs will decline more in many cases. Shelled sweet almonds will face a tariff of 3.5 percent, half of the current 7.0 percent for imports over the 45,000 ton TRQ. The tariff for shelled walnuts will be 5.1 percent compared to the current 8.0 percent, and for in-shell walnuts, the tariff will be cut in half to 4.0 percent. The winter seasonal tariff for grapefruit (November 1 to April 30) will be bound from 3.0 percent to 1.5 percent. Fresh cut foliage will see its tariff decline from 10 percent to 2.5 percent.

Among processed products, the tariff for potato chips will decline from 22 percent to 14.1 percent. Canned and frozen sweet corn will have a 5.1 percent tariff + 94 ECU per ton, down considerably from the current 8 percent tariff + 147 ECU per ton surcharge. The tariff for hops extract will decline from 5.0 to 3.2 percent.

Another aspect of concessions from the Uruguay Round is the elimination of all non-tariff barriers to trade, such as import quotas and variable levies. The EU has committed to **1)** placing ceiling on and reducing minimum import prices, **2)** placing ceilings and reducing the levy charged on product below the minimum import price, and **3)** reducing the fixed tariffs. A special safeguard to protect against a surge of imports below the minimum import price (MIP) or falling world prices might also be applied.

The provisions for the former MIP system will apply to tomatoes, cucumbers, globe artichokes, squash, olives, fresh and processed sweet corn, citrus, grapes, apples, pears, apricots, cherries, peaches and nectarines, plums, and grape juice.

Tariff rate quotas (TRQs) will be put in place for many products that currently have variable levies or other import restrictions other than tariffs (refer to FHORT 1-95 for an in-depth treatment of the EU banana regime). High quality sweet oranges, similar citrus hybrids (mineolas), and lemons all have tariff rate quotas (20,000 tons, 15,000 tons, and 10,000 tons respectively). For almonds, the tariff rate quota stays at 45,000 tons. Dried onions will have the same TRQ of 12,000 tons. Frozen orange juice from HS 200911 (less than or equal to 50 degrees brix and less than or equal to 2 liters) will have a tariff rate quota of 1,500 tons. Over the next five years, the tariff rate quota for preserved mushrooms will increase slightly from 61,260 tons to 62,660 tons.

Imports by Sector

Fresh Fruit

Because the United States is temperate and in the Northern Hemisphere, like the European Union, the marketing season for most U.S. fresh produce is the same as that in the EU. Consequently, Southern Hemisphere countries like Chile, Argentina, South Africa, and New Zealand take advantage of the EU's off-season to provide the EU with much more fresh deciduous fruit. EU fresh deciduous fruit imports totalled $857 million in 1993, compared to $1.5 billion in 1992. This is mainly because of the European recovery in deciduous tree fruit production in 1992/93 from the disastrous 1991/92 season. Of that amount, $252 million was from Chile; $230 million was from South Africa; $86 million from New Zealand; $83 million from Argentina; and $34 million from the United States. Imports of apples from the United States were only $17 million in 1993, while apple imports from South Africa, $91 million; from New Zealand, $86 million; and from Chile were $72 million.

Grape imports totalled $279 million. Of this amount, $121 million came from Chile; $89 million from South Africa; and $9 million from the United States. Morocco was the leading supplier of strawberries, with $12 million, followed by Poland ($10 million), and the United States ($5 million).

For fresh citrus, the leading supplier was Morocco with $210 million, followed by Israel with $135 million, South Africa with $131 million, Argentina with $103 million, and the

United States with $88 million. For fresh oranges, Morocco is the leading supplier with $148 million, followed by South Africa with $88 million. For fresh grapefruit, total imports were $221 million, with the United States as the top supplier with $73 million, followed by Israel with $31 million.

Fresh pineapple imports totalled $134 million, with the bulk coming from Côte d'Ivoire ($74 million). The leading supplier of bananas and plantains was Ecuador, with $286 million, followed by the Canary Islands ($249 million), Costa Rica ($237 million), Colombia ($196 million), Panama ($187 million), and Côte d'Ivoire ($110 million).

Fresh Vegetables

For fresh vegetables (except potatoes), the Canary Islands -- an overseas administrative area of Spain with a preferential trading relationship -- was the largest supplier, accounting for $207 million. Morocco was the second leading supplier with $146 million, and Kenya was the third leading supplier with $39 million. The United States is the seventh largest supplier, with $18 million.

Fresh and seed potato imports totalled $151 million, with $54 million from Cyprus, $43 million coming from Egypt, and $30 million from Morocco. Because of phytosanitary restrictions, imports from the United States were nil.

Tree Nuts and Dried Fruit

Total tree nut imports amounted to $1.18 billion in 1993. The United States was the leading supplier, with $391 million, followed by Turkey ($283 million), Iran ($228 million), and India $111 million). The United States is far and away the leading supplier of shelled almonds to the EU, with $272 million and a 97 percent market share. The United States was also the leading supplier of unshelled walnuts, at $77 million, and the leading supplier of shelled walnuts, at $8 million. The Philippines and Sri Lanka were the two leading suppliers of fresh and dried coconut, with $22 million and $16 million respectively. With dried prunes, of total EU imports of $68 million, imports from the United States were valued at $64 million. Of a total of $307 million, Turkey was the leading supplier of dried grapes of all varieties, at $128 million, followed by the United States with $80 million, and Australia with $39 million.

Fruit Juices

For frozen concentrated orange juice, total imports were $493 million. The leading supplier was Brazil, with $429 million, followed by the United States with $26 million, and Israel with $16 million. For grapefruit juice, total imports were $77 million. Israel was the leading supplier with $41 million, followed by the United States with $15 million. Apple juice imports totalled $108 million. For apple juice, Poland was the largest supplier with $62 million, followed by Turkey with $22 million.

Processed Products

Prepared and preserved vegetable imports totalled $562 million in 1993. Of this amount, $135 million came from China (mostly canned mushrooms), followed by Turkey ($99 million), Peru ($67 million), and the United States ($60 million). Canned sweet corn imports were $57 million, of which $33 million came from the United States. Frozen vegetable imports totalled $248 million, with Poland as the leading supplier ($25 million). Other leading suppliers were China ($24 million) and Israel ($22 million).

Potato chip imports have increased dramatically from just over $1 million in 1988 to $25 million in 1993. Of that amount, 76 percent or $19 million came from the United States.

Hops, a key ingredient for making beer, was imported to the tune of $29 million. Of this amount, 73 percent or $21 million came from the United States.

Cut foliage imports (live cuttings other than flowers) totalled $162 million in 1993. The United States was the leading supplier with $75 million, followed by Costa Rica ($50 million).

Wine

While the European Union is the world's largest wine exporter, it is also an important importer. In 1993, imports totalled $450 million. Australia was the leading supplier, with $108 million, followed by the United States ($64 million), and Bulgaria ($52 million).

For bottled red and rosé wines, imports totalled $157 million. Australia was the leading supplier with $41 million, followed by Bulgaria ($33 million), and the United States ($22 million). Bottled white wine imports totalled $154 million. Australia was the leading supplier with $54 million, followed by the United States ($19 million), and Austria ($15 million).

Current Marketing Situation

The prospects for improvements in U.S. horticultural exports remain high especially when crops are not in the surplus situation seen in the past 2 years. As mentioned above, U.S. horticultural exports in 1994 totalled $1.44 billion, up 11 percent over 1993's $1.33 billion. A continuing economic recovery in Europe, a relatively weak dollar against several European currencies, and good U.S. supplies will ensure continued growth.

Tree nuts again are the shining star in U.S. horticultural exports to the EU. Exports jumped 25 percent in 1994 to $561 million. Shelled almond exports jumped from $220 million in 1993 to $295 million in 1994, a 34 percent increase. Prepared/preserved almond exports also increased, up 27 percent to $138 million. Total walnut exports also increased to $86 million, up 15 percent.

U.S. juice exports increased 20 percent to $97 million, mostly from higher orange juice sales.

U.S. frozen french fry sales have increased dramatically as a result of the poor 1994 EU potato crop. They have increased from only $600,000 in 1993 to $9 million in 1994. Potato chip exports are also booming, up 148 percent to $41 million.

U.S. fresh fruits and vegetables, tree nuts, and processed products all have a very good reputation in the EU for high quality. Currently, the U.S. dollar has been losing value against the major EU currencies, and is much lower in value than during the mid-1980's. The current economic expansion in Europe also helps boost U.S. exports.

The EU consumer is sophisticated and demands high quality in fresh produce. Importers consider several factors when selecting suppliers: 1) quality, 2) proper packaging, 3) reliability and consistency of supply, and 4) price.

Because domestic produce is generally high quality, consumers expect comparable quality from imports. Except when there is a crop failure, there are adequate supplies of top quality fresh fruits and vegetables from within the EU. There is little demand for second grade (Class II) produce. Quality characteristics important to EU consumers include the appearance, taste, and texture of the produce.

Packaging is also very important. Size, appearance, and composition of the packaging material is always scrutinized by the importer. Appropriate size containers, as well as the composition of the pallets, cartons, boxes, etc., is important as many EU countries, particularly Germany, require recyclability.

Consistent, reliable supply is important to EU importers. Exporters that deliver quality produce, are willing to exchange information, and who are willing to ride out low price swings and continue to stay in the market (even only marginally) are attributes importers value highly. Several key products where the EU is a major market for U.S. exports are profiled as follows:

Dried Fruit

Prunes - U.S. dried prune exports to Germany averaged only 5,545 tons for the ten years prior to the launch in 1985/86 of the TEA program (Targeted Export Assistance), which later evolved into the MPP (Market Promotion Program). Since then, exports have surged to 17,419 tons in marketing year 1992/93, more than doubling in seven years.

Exports to Germany in MY 1993/94 fell to 10,952 tons, a 37 percent drop in volume terms. However, in value terms, exports to Germany increased 17 percent to $25.8 million. This paradox is due to a short California crop and strong German demand. For the current marketing year-to-date (August-January), U.S. exports to Germany are at 5,302 tons, slightly below the same period a year earlier. Despite price competition from France, Chile, the former Yugoslavia, and Argentina, U.S. prunes have steadily maintained German market share, reaching 85 percent in 1992/93.

The German market is the most complex of any in Europe. It is made up of local chains, regional chains, cooperatives, and voluntary buying clubs. It has been estimated that over 4,000 buyers are responsible for all German distribution. The private label concept is very weak in Germany, with existing private labels viewed more like "brands."

California prune exports to the United Kingdom fell 51 percent in volume terms to 3,617 tons in MY 1993/94. However, in value terms, exports only fell 24 percent to $7.1 million. The short 1993 crop in combination with the U.K. retail system contributed to the demise.

The U.K. retail sector is controlled by six retailers, each with significant private label volume. Therefore, higher priced, higher quality U.S. prunes lose out to cheaper third country suppliers for the private label market. Furthermore, discount chains such as the German giant, Aldi, have made inroads in the UK retail sector. This puts more pressure on already thin margins.

Publicly, the prune still carries the laxative stigma. This makes penetrating younger user groups more difficult. The California Prune Board is fighting the medicinal image of prunes by concentrating on the prunes versatility, taste, and nutrition.

For the first 4 months of MY 1994/95, prune sales to the United Kingdom are off 12 percent in volume terms but are up 19 percent in value terms as compared to the same period last year.

Raisins - The United Kingdom is the world's largest importer and consumer of dried vine fruits, with consumption at 1.55 kilograms per person. Competition for this market is very intense, with 8 major producing countries supplying either raisins or sultanas. Raisins are supplied by the United States, South Africa, Afghanistan, Iran, and Chile. Sultanas are supplied by Greece, Turkey, and Australia.

U.S. exports of raisins to the United Kingdom topped 26,123 tons in MY 1993/94, up just two percent in volume terms over the same period last year. In value terms, however, exports jumped 13 percent to $40.2 million. For the first 4 months of MY 1994/95, exports hit 10,817 tons valued at $15.8 million, running at about the same pace as last year.

In the United Kingdom, consumers differentiate between raisins and sultanas. The light colored sultana is used mainly in home baking, as well as in manufactured food products like cereals and breads. Raisins are used in home baking and snacking, as well as in salads, desserts, and in breakfast cereals.

The U.S. industry, through MPP efforts, has positioned California raisins as a high quality product. The U.K. food retail system, which is dominated by chain stores known as "multiples", has carried U.S. raisins for years. However, discount stores, similar to those set up in the United States, are beginning to crop up. This could provide an avenue for cheaper Turkish and Iranian raisins to enter the retail markets.

In Germany, the second largest market for U.S. raisins, competition is also very strong. The product differentiation between raisins and sultanas is not as defined in Germany as in the

United Kingdom. Still, consumers prefer the light sultanas for baking, and dark raisins for snacking or mixing with nuts.

Australia is Germany's largest supplier in this price-conscious market, holding about 24 percent of the total market (1992 data). The United States is the second largest supplier, taking about 20 percent of the market.

U.S. exports to Germany in MY 1993/94 hit 12,132 tons, down 8 percent from the previous year. In value terms, exports were only down 2 percent. However, for the first 4 months of MY 1994/95, exports have fallen 43 percent in volume terms and 38 percent in value terms. The sharp decline in U.S. exports is partly due to the dissolution of the California Raisin Advisory Board (CALRAB) in August 1994. As a result, the raisin industry has not been able to continue its trade and consumer support activities as they had in the past, and exports have suffered.

Tree Nuts

Almonds - Almonds are the single largest horticultural product sold by the United States to the EU. Shelled almond exports jumped from $220 million in 1993 to $295 million in 1994, a 34 percent increase. Prepared/preserved almond exports increased 27 percent to $138 million. The only other major competitor in this market is Spain.

In 1993, Germany was the largest market in the EU, with $145 million in shelled almond imports in 1993, followed by the France with $40 million, and the United Kingdom with $33 million.

Most almonds are sold as a snack food for home cooking, or for institutional use in baking confectionery items. U.S. almonds have a strong "California" identification, which gives them a distinct marketing advantage in many member states.

The California almond industry is actively marketing in Germany, France, Sweden and the United Kingdom. Almond consumption in Europe is centered around traditional baking uses.

Current marketing efforts are aimed at widening demand in many ways. One important effort is promoting retail-pack almonds sold in several flavors, both in foil and can packaging. Increasing distribution in the difficult German market (read more about German retail food distribution in section on prunes, above) is another major effort. Another push is to teach consumers that almonds are a year-round snack, just like pretzels or potato chips, not just a holiday season specialty.

Walnuts - The U.S. walnut industry's marketing efforts in Italy and Germany have centered on the walnut as a high quality ingredient that is both versatile and healthful. The "healthfulness" of California walnuts will permeate all activities Europe due to the exposure the Loma Linda study has received in the international press.

Pistachios - One of the primary U.S. producers of pistachios has established a marketing and sales office in the United Kingdom, servicing all of Europe. In addition, this firm has set up an import agreement with one of the leading German importers. This will entail roasting and packing the product in Germany.

The California industry is distributing cardboard display bins to encourage in-store promotions and distribution of the product. In the United Kingdom, the California industry is using intensive trade servicing to get the California pistachio sold in the fresh produce section where more impulse purchases are made.

Deciduous Fruit

With so many suppliers, marketing efforts are intense. Niche marketing efforts have been successful in distinguishing American product and varieties from the European ones. U.S. exporters promoting the Empire apple variety have had great success in getting new importers to carry their product.

The United Kingdom is by far the largest market in the EU for U.S. deciduous and stone fruit (apples, pears, cherries, peaches, plums and nectarines). Sweden is also a market for U.S. cherries and pears, although this will be somewhat dampened by Sweden's accession to

the EU. In the past, U.S. cherries have represented 40-50 percent of the cherry market in Sweden.

U.S. deciduous and stone fruit face tough competition from European suppliers. In addition, Southern Hemisphere countries compete with fruit that is sold year-round. The United States has an advantageous position by having an earlier season, a longer season, more varieties, and better quality fruit, than local or other imported fruit. Promotional activities which include advertising, public relations, cooperative promotions, point-of-sale materials, in-store tasting, and educational materials all contribute to the competitiveness of U.S. products in the European market.

Citrus

Fresh - Once a major market for U.S. citrus, competition from nearby Mediterranean supplies and the tariff preferences they receive, have reduced the EU to a residual market for oranges and lemons from the United States.

However, the United States became the top supplier of grapefruit to the EU by emphasizing the availability of high quality, pink or red fruit from Florida. Now that these varieties are also available from other countries, U.S. exports have suffered. Efforts are underway to differentiate the qualities of Florida fruit on the basis of juice and sweetness to give Florida a higher value in the eyes of the consumer.

Citrus Juice - The EU as a market for U.S. juices, particularly orange juice, has shown strong growth in recent years, led by the not-from-concentrate (NFC) product. Growth has been fueled by consumer interest in more natural products, with their health and wellness benefits. Abundant supplies from the two major producers, Brazil and the United States, has lowered price to the consumer and stimulated consumption. France, Germany and the United Kingdom are three markets where considerable growth is expected. Chilled juices from the United States are able to fulfill the consumers preference for healthy, nutritious beverages with the freshly squeezed taste.

Wine

In the EU, U.S. wine exporters face a market inundated by a surplus "wine lake" and plagued by falling demand as per capita wine consumption drops in many countries. The retail market (as opposed to the restaurant trade) is where the great sales potential lies. To gain market share, brands need to be price-competitive and must provide substantial promotional funding. There will always be interest in high-quality U.S. wines on the part of knowledgeable wine drinkers, but these opportunities will provide no more than niche markets. Furthermore, the United States must compete against other so-called "New World" wines from countries such as Chile, Australia and South Africa, all three of which are very price-competitive with U.S. wines and have already made substantial inroads into the various country markets.

The United Kingdom is the largest European market for U.S. wines with exports estimated at $40 million for 1994. Its per capita consumption is low by European standards but U.K. wine consumption is actually increasing. There are more than 45 countries that export wine to this market, making it one the most competitive and price sensitive wine import markets in the world. The supermarket chains have considerable influence in setting prices and in the overall success of a wine producing country.

The U.S. wine industry's best prospects in the EU may lie in Germany, where wine consumption is actually growing. Germany is the world's leading wine importing country, with imports currently holding 51 percent of the market share. The German market is considered one of the most promising for U.S. wine exports. The German consumer tends to be a little more innovative in terms of wine choices than other Europeans, which is one of the reasons U.S. wines have made significant progress in increasing exports. Export sales of U.S. wine for 1994 are estimated at $4.5 million with an estimated share of the German wine import market of less than one percent.

In the Netherlands, the U.S. did particularly well in 1994 with export sales estimated at $4.5 million. Over the past five years, U.S. wine exports have increased by more than two and one-half times. Most of the wine is purchased in supermarkets, followed by specialized liquor stores.

Despite the daunting challenges, U.S. wines have had decided successes in certain markets. Due to growing interest in foreign foods and beverages by French consumers and the opening of EuroDisney, consumption of American wines continues to rise in France. EuroDisney is currently the largest single importer of U.S. wines in Europe. French imports of U.S. wines estimated for 1994 are estimated at $2.5 million with an estimated share of the French import market of less than one percent.

(Mark Thompson, 202-720-6877)

EU Imports of Horticultural Products from Non-EU Sources, 1993
Quantity in Metric Tons

Product Category	France	Netherlands	United Kingdom	Germany	Belgium/ Luxembourg	Italy	Denmark	Portugal	Greece	Ireland	Spain	Total
Fruit, fresh and processed												
Citrus	338,902	371,526	400,790	157,564	157,142	36,941	6,701	2,537	49	8,426	174	1,480,752
Fresh deciduous fruit	52,072	243,592	261,513	230,425	188,768	81,799	3,625	12,538	4,738	579	26,747	1,106,396
Fresh melons	11,087	27,476	37,186	14,008	3,846	4,867	480	334	759	3	1,044	101,090
Other fresh fruit	783,213	121,137	509,164	1,120,126	599,933	415,489	40,220	112,894	53,824	28,471	390,259	4,174,730
Frozen fruit	28,915	35,240	22,910	163,097	8,445	6,686	9,105	17	800	18	1,699	276,932
Canned fruit	78,730	100,656	123,619	190,298	26,967	30,474	8,489	9,138	2,677	1,818	26,094	598,960
Misc. prepared fruit	10,468	15,004	31,292	35,200	3,967	10,202	1,329	281	1,710	1,041	2,771	113,265
Olives	36,135	1,241	748	5,205	980	3,054	53	0	51	0	411	47,878
Dried fruit	17,402	35,630	90,531	89,481	10,174	25,139	7,619	1,223	1,966	5,989	5,232	290,386
Fruit and vegetable juices	100,147	336,376	73,409	277,751	100,147	16,250	7,807	1,908	4 115	6,811	17,609	942,330
Subtotal, fresh and processed fruit	1,457,071	1,287,878	1,551,162	2,283,155	1,100,369	630,901	85,428	140,870	70,689	53,156	472,040	9,132,719
Vegetables, fresh and processed												
Fresh vegetables except potatoes	194,512	248,398	142,037	157,175	15,656	22,094	2,045	1,218	9,600	1,181	21,093	815,009
Fresh potatoes	80,867	8,616	142,960	48,356	73,686	12,127	194	3,004	23,204	1,361	424	394,799
Prepared/preserved vegetables	65,730	80,129	60,913	184,467	9,981	21,533	14,275	345	3 053	1,890	11,543	453,859
Frozen vegetables	22,746	30,840	51,393	87,481	12,027	18,049	8,741	93	6,469	391	3,831	242,061
Dehydrated vegetables	11,821	8,489	34,314	22,593	180,891	193,489	12,687	19,981	445	1,041	2,824	488,575
Subtotal, fresh and processed vegetables	375,676	376,472	431,617	500,072	292,241	267,292	37,942	24,641	42,771	5,864	39,715	2,394,303
Other horticultural products												
Tree nuts	42,060	51,988	61,606	179,617	13,265	43,000	6,447	5,470	7,160	688	25,147	436,448
Wine	20,480	12,142	120,473	127,458	5,158	2,844	8,233	21	372	1,273	747	299,201
Hops	775	136	1,045	893	744	17	19	47	0	265	70	4,011
Nursery products except cut flowers	4,779	58,574	3,557	32,620	3,354	7,323	2,622	327	515	43	4,571	118,285
Cut flowers	3,116	47,037	17,938	17,609	433	4,130	90	40	130	467	2,520	93,510
Miscellaneous	4,496,217	3,285,771	79,922	853,365	646,003	146,914	38,614	394,256	6,385	16,275	1,263,598	11,227,320
Subtotal, other horticultural products	4,567,427	3,455,648	284,541	1,211,562	668,957	204,228	56,025	400,161	14,562	19,011	1,296,653	12,178,775
Total horticultural imports	6,400,174	5,119,998	2,267,320	3,994,789	2,061,567	1,102,421	179,395	565,672	128,022	78,031	1,808,408	23,705,797

Source Eurostat

EU Imports of Horticultural Products from Non-EU Sources, 1993
Value in $1,000

Product Category	France	Netherlands	United Kingdom	Germany	Belgium/ Luxembourg	Italy	Denmark	Portugal	Greece	Ireland	Spain	Total
Fruit, fresh and processed												
Citrus	$204,573	$178,857	$170,229	$82,346	$85,238	$17,743	$3,175	$1,277	$12	$3,263	$93	$746,806
Fresh deciduous fruit	$43,569	$196,646	$233,629	$134,103	$154,776	$62,065	$3,560	$9,327	$3,498	$516	$15,358	$857,047
Fresh melons	$23,938	$22,042	$28,004	$8,354	$4,115	$4,021	$455	$430	$539	$1	$529	$92,428
Other fresh fruit	$610,074	$107,088	$388,406	$580,263	$363,074	$229,267	$20,657	$66,852	$26,856	$12,821	$295,597	$2,700,955
Frozen fruit	$41,937	$33,675	$30,613	$187,708	$10,834	$9,337	$10,534	$25	$570	$33	$2,272	$327,538
Canned fruit	$81,090	$78,666	$113,064	$168,450	$24,213	$22,893	$6,970	$6,715	$2,196	$1,848	$21,106	$527,211
Misc prepared fruit	$20,795	$19,696	$40,276	$70,737	$8,533	$16,348	$1,750	$347	$2,245	$1,012	$4,066	$185,805
Olives	$42,123	$1,713	$1,176	$7,225	$1,164	$4,017	$42	$0	$89	$0	$567	$58,116
Dried fruit	$29,948	$52,341	$138,022	$143,402	$14,691	$45,060	$13,246	$1,919	$2,855	$8,074	$8,778	$458,336
Fruit and vegetable juices	$97,297	$324,034	$84,533	$264,576	$92,963	$20,249	$7,829	$1,196	$7,373	$9,273	$13,851	$923,174
Subtotal, fresh and processed fruit	$1,195,344	$1,014,758	$1,227,952	$1,647,164	$759,601	$431,000	$68,218	$88,088	$46,233	$36,841	$362,217	$6,877,416
Vegetables, fresh and processed												
Fresh vegetables except potatoes	$187,099	$203,076	$140,772	$132,621	$15,138	$38,036	$2,253	$1,312	$2,416	$318	$12,643	$735,684
Fresh potatoes	$37,442	$3,275	$57,091	$16,277	$28,571	$2,443	$70	$758	$4,285	$434	$116	$150,762
Prepared/preserved vegetables	$94,886	$97,058	$68,848	$203,980	$11,892	$38,926	$17,410	$379	$2,840	$3,907	$21,693	$561,819
Frozen vegetables	$33,278	$27,499	$60,869	$72,978	$14,338	$23,464	$7,656	$154	$3,763	$415	$4,067	$248,481
Dehydrated vegetables	$31,343	$14,463	$33,582	$57,315	$28,960	$52,550	$3,251	$2,972	$696	$1,006	$4,149	$230,287
Subtotal, fresh and processed vegetables	$384,048	$345,371	$361,162	$483,171	$98,899	$155,419	$30,640	$5,575	$14,000	$6,080	$42,668	$1,927,033
Other horticultural products												
Tree nuts	$125,227	$119,736	$153,123	$525,847	$35,943	$112,277	$17,432	$13,269	$17,335	$1,001	$55,439	$1,176,629
Wine	$27,890	$22,291	$243,595	$124,552	$9,620	$2,117	$14,192	$177	$513	$3,505	$1,947	$450,399
Hops	$832	$2,522	$7,443	$8,077	$6,594	$314	$426	$839	$1	$1,613	$1,246	$29,907
Nursery products except cut flowers	$14,585	$168,835	$15,348	$124,122	$7,076	$18,300	$5,450	$1,046	$721	$155	$8,063	$363,701
Cut flowers	$16,335	$174,755	$84,705	$88,262	$2,323	$31,250	$661	$370	$952	$3,149	$14,023	$416,785
Miscellaneous	$194,230	$526,420	$114,047	$315,398	$108,011	$81,295	$40,134	$59,297	$9,523	$6,611	$191,193	$1,646,159
Subtotal, other horticultural products	$379,099	$1,014,559	$618,261	$1,186,258	$169,567	$245,553	$78,295	$74,998	$29,045	$16,034	$271,911	$4,083,580
Total horticultural imports	$1,958,491	$2,374,688	$2,207,375	$3,316,593	$1,028,067	$831,972	$177,153	$168,661	$89,278	$58,955	$676,796	$12,888,029

Source: Eurostat

EU Imports of Horticultural Products from the United States, 1993
Quantity in Metric Tons

Product Category	France	Netherlands	United Kingdom	Germany	Belgium/ Luxembourg	Italy	Denmark	Portugal	Greece	Ireland	Spain	Total
Fruit, fresh and processed												
Citrus	51,906	35,597	12,189	7,757	6,821	268	153	0	0	0	0	114,691
Fresh deciduous fruit	117	3,147	32,365	873	366	6	203	21	229	361	252	37,940
Fresh melons	0	123	121	7	12	0	0	0	0	0	0	263
Other fresh fruit	5,632	4,277	5,437	1,123	133	1,365	56	19	33	569	122	18,766
Frozen fruit	630	773	1,844	1,388	59	109	20	0	0	18	0	4,841
Canned fruit	281	1,907	648	2,624	2,215	347	44	0	18	0	29	8,113
Misc. prepared fruit	1,440	2,691	1,433	761	67	285	93	3	34	17	148	6,972
Olives	0	0	11	3	0	0	0	0	2	0	183	199
Dried fruit	389	4,161	30,022	25,637	1,688	7,292	6,908	78	51	293	2,205	78,724
Fruit and vegetable juices	30,376	15,897	15,138	3,453	20,100	712	432	2	2,187	18	329	88,644
Subtotal, fresh and processed fruit	90,771	68,573	99,208	43,626	31,461	10,384	7,909	123	2,554	1,276	3,268	359,153
Vegetables, fresh and processed												
Fresh vegetables except potatoes	978	1,543	7,839	383	142	481	114	1	0	103	262	11,846
Fresh potatoes	0	50	0	2	0	0	0	0	0	0	0	52
Prepared/preserved vegetables	2,885	3,849	17,703	11,335	43	913	3,435	134	473	1,386	837	42,993
Frozen vegetables	147	171	4,584	549	74	32	221	10	87	30	0	5,905
Dehydrated vegetables	542	1,551	5,182	3,526	158	131	324	74	21	232	378	12,119
Subtotal, fresh and processed vegetables	4,552	7,164	35,308	15,795	417	1,557	4,094	219	581	1,751	1,477	72,915
Other horticultural products												
Tree nuts	12,108	10,262	11,346	57,967	1,704	8,185	3,338	676	608	69	11,850	118,113
Wine	1,085	895	15,849	1,314	911	195	2,391	16	56	357	70	23,139
Hops	773	130	560	442	138	7	19	26	0	147	65	2,307
Nursery products except cut flowers	265	11,966	1,726	9,192	253	916	32	1	36	17	416	24,820
Cut flowers	0	81	8	26	0	13	0	0	0	2	0	130
Miscellaneous	5,249	6,494	17,346	1,694	2,232	1,757	1,084	404	581	364	30,084	67,289
Subtotal, other horticultural products	19,480	29,828	46,835	70,635	5,238	11,073	6,864	1,123	1,281	956	42,485	235,798
Total horticultural imports	114,803	105,565	181,351	130,056	37,116	23,014	18,867	1,465	4,416	3,983	47,230	667,866

Source: Eurostat

EU Imports of Horticultural Products from the United States, 1993
Value in $1,000

Product Category	France	Netherlands	United Kingdom	Germany	Belgium/ Luxembourg	Italy	Denmark	Portugal	Greece	Ireland	Spain	Total
Fruit, fresh and processed												
Citrus	$35,019	$23,036	$8,057	$5,159	$4,203	$175	$50	$1	$0	$0	$0	$75,700
Fresh deciduous fruit	$218	$2,424	$28,801	$1,120	$529	$8	$290	$48	$231	$359	$199	$34,227
Fresh melons	$0	$164	$165	$8	$7	$0	$0	$0	$0	$0	$0	$344
Other fresh fruit	$10,193	$5,863	$10,742	$3,791	$346	$1,501	$104	$45	$60	$249	$178	$33,072
Frozen fruit	$1,197	$1,125	$3,260	$2,533	$118	$213	$45	$0	$0	$33	$0	$8,524
Canned fruit	$544	$2,603	$1,662	$3,105	$2,388	$338	$81	$0	$56	$0	$25	$10,802
Misc. prepared fruit	$2,887	$2,667	$5,348	$2,332	$299	$407	$183	$16	$237	$32	$653	$15,061
Olives	$0	$0	$9	$8	$0	$0	$2	$0	$4	$0	$331	$354
Dried fruit	$620	$7,884	$50,834	$48,262	$3,564	$20,685	$12,043	$161	$116	$409	$3,776	$148,354
Fruit and vegetable juices	$28,139	$12,486	$14,425	$5,428	$15,310	$781	$525	$8	$5,216	$43	$382	$82,743
Subtotal, fresh and processed fruit	$78,817	$58,252	$123,303	$71,746	$26,764	$24,108	$13,323	$279	$5,920	$1,125	$5,544	$409,181
Vegetables, fresh and processed												
Fresh vegetables except potatoes	$2,567	$1,305	$9,636	$1,460	$628	$1,639	$145	$1	$0	$12	$421	$17,814
Fresh potatoes	$0	$20	$0	$2	$0	$0	$0	$0	$0	$0	$0	$22
Prepared/preserved vegetables	$2,898	$4,048	$28,882	$12,228	$96	$1,128	$4,403	$170	$770	$3,382	$2,068	$60,073
Frozen vegetables	$267	$164	$5,349	$832	$80	$39	$505	$19	$174	$41	$0	$7,470
Dehydrated vegetables	$3,162	$3,552	$12,925	$10,126	$430	$528	$835	$164	$53	$546	$1,036	$33,357
Subtotal, fresh and processed vegetables	$8,894	$9,089	$56,792	$24,648	$1,234	$3,334	$5,888	$354	$997	$3,981	$3,525	$118,736
Other horticultural products												
Tree nuts	$48,068	$37,058	$43,053	$192,324	$6,602	$20,089	$12,161	$2,008	$2,064	$264	$26,821	$390,512
Wine	$4,541	$2,957	$43,294	$5,673	$1,743	$365	$3,678	$136	$138	$1,014	$525	$64,064
Hops	$812	$2,406	$5,349	$5,640	$3,457	$304	$421	$570	$1	$1,139	$1,134	$21,233
Nursery products except cut flowers	$999	$40,695	$4,327	$40,054	$943	$3,088	$145	$26	$198	$69	$1,047	$91,591
Cut flowers	$0	$416	$70	$198	$1	$140	$0	$0	$0	$9	$4	$838
Miscellaneous	$44,416	$17,917	$34,055	$14,077	$7,616	$30,159	$2,227	$4,722	$2,108	$1,040	$23,152	$181,489
Subtotal, other horticultural products	$98,836	$101,449	$130,148	$257,966	$20,362	$54,145	$18,632	$7,462	$4,509	$3,535	$52,683	$749,727
Total horticultural imports	$186,547	$168,790	$310,243	$354,360	$48,360	$81,587	$37,843	$8,095	$11,426	$8,641	$61,752	$1,277,644

Source: Eurostat

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 95

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
MEXICO		17,572	5,352	49,379	38,102	152,059	10,107	3,281	28,006	22,398	86,274
TAIWAN		15,194	10,828	72,240	87,066	99,053	12,860	8,396	57,373	68,615	75,244
CANADA		6,929	6,626	44,845	47,859	80,913	5,306	5,186	33,540	33,530	59,914
HONG KONG		8,832	7,938	34,263	39,476	61,585	4,875	4,391	19,733	22,316	33,749
EU-15		4,302	4,171	22,300	33,718	36,288	1,999	2,216	10,214	15,416	18,074
THAILAND		3,878	3,822	21,568	22,588	31,005	2,448	2,377	15,664	14,488	21,277
OTHER		21,065	27,246	107,229	182,285	147,673	10,795	15,290	55,906	95,314	78,842
Subtotal:-----		77,772	65,983	351,825	451,093	608,577	48,389	41,138	220,435	272,076	373,374
FR. PEARS(JUL)	MT										
MEXICO		4,845	3,478	25,520	35,637	53,629	2,362	1,667	13,218	16,294	26,653
CANADA		2,703	4,238	28,320	34,130	39,645	1,801	2,596	18,872	20,067	26,222
EU-15		275	1,564	11,390	8,219	11,674	128	634	5,044	3,178	5,262
TAIWAN		526	263	2,757	4,723	8,059	312	178	1,691	2,853	4,834
OTHER		1,701	2,882	13,938	24,134	15,326	932	1,572	7,756	12,548	8,482
Subtotal:-----		10,050	12,425	81,926	106,843	128,332	5,535	6,647	46,581	54,940	71,452
APRICOTS(MAY)	MT										
CANADA		11	26	3,022	3,134	3,030	14	32	4,031	3,288	4,043
MEXICO		0	0	1,515	3,718	1,515	0	0	1,183	2,596	1,183
EU-15		0	0	309	209	317	0	0	949	609	955
OTHER		0	18	305	736	354	0	11	454	1,287	487
Subtotal:-----		11	44	5,151	7,797	5,216	14	43	6,617	7,779	6,667
FR CHERRIES(MAY)	MT										
JAPAN		0	0	12,467	15,576	12,467	0	0	77,333	92,545	77,333
CANADA		3	14	6,235	6,316	6,235	9	31	13,376	13,281	13,376
EU-15		0	110	2,172	4,137	2,213	0	73	7,759	11,115	7,926
TAIWAN		19	0	2,140	3,004	2,140	30	0	4,705	8,133	4,705
HONG KONG		16	0	1,833	1,377	1,847	24	0	5,518	3,668	5,550
OTHER		0	0	510	535	522	0	0	1,761	2,112	1,806
Subtotal:-----		38	124	25,356	30,945	25,424	64	103	110,452	130,853	110,696
PEACH-NECTRN(MAY)	MT										
CANADA		479	468	47,363	47,757	48,374	610	558	44,069	39,705	45,185
MEXICO		0	0	6,190	16,203	6,214	0	0	3,361	6,851	3,374
TAIWAN		0	0	4,194	12,446	4,207	0	0	4,269	13,511	4,276
OTHER		15	60	4,407	7,103	4,472	8	36	3,849	5,416	3,910
Subtotal:-----		493	528	62,153	83,509	63,265	618	594	55,548	65,482	56,746
PLUM-PRUNES(MAY)	MT										
CANADA		200	161	22,684	24,128	23,302	289	237	22,648	18,638	23,412
TAIWAN		0	0	13,733	25,396	13,733	0	0	12,198	22,161	12,198
HONG KONG		0	0	7,995	8,852	7,995	0	0	6,825	7,300	6,825
MEXICO		0	0	3,003	3,552	3,003	0	0	1,924	2,112	1,924
OTHER		22	216	6,641	8,594	6,660	45	404	5,855	7,231	5,875
Subtotal:-----		222	377	54,055	70,521	54,692	334	641	49,450	57,441	50,234
FR AVOCADOS(OCT)	MT										
EU-15		178	1,118	835	2,724	4,698	186	846	749	2,136	4,440
FRANCE		104	563	358	1,427	2,156	82	421	287	1,146	1,944
CANADA		89	244	657	796	2,054	106	183	772	648	2,728
JAPAN		114	33	477	199	1,995	96	42	411	288	3,905
NETHERLANDS		25	300	174	735	1,278	67	217	211	560	1,302
UNITED KINGDOM		50	199	262	449	865	37	173	237	351	871
OTHER		11	2	28	5	176	17	3	39	19	265
Subtotal:-----		392	1,396	1,996	3,724	8,923	406	1,073	1,972	3,091	11,338
FR KIWIFRUIT(OCT)	MT										
CANADA		537	537	1,624	1,944	3,730	615	644	1,947	2,263	4,605
TAIWAN		309	14	536	93	1,990	584	17	949	170	3,556
KOREA, REPUBLIC		153	474	619	797	1,729	294	823	1,146	1,426	3,120
MEXICO		87	0	192	261	502	62	0	203	162	494
OTHER		320	174	411	672	799	462	255	637	953	1,315
Subtotal:-----		1,406	1,199	3,383	3,766	8,749	2,017	1,739	4,882	4,975	13,091
FRESH GRAPES (MAY)	MT										
CANADA		808	609	108,192	99,463	111,233	1,225	1,035	118,871	109,127	123,408
HONG KONG		17	52	18,018	21,117	18,018	6	92	20,938	25,238	20,938
TAIWAN		502	83	13,270	14,628	13,330	471	50	17,183	20,800	17,239
MEXICO		719	67	9,620	22,589	10,757	635	56	9,183	19,218	9,922
OTHER		1,299	865	52,599	54,587	53,162	1,434	1,069	66,988	73,855	67,575
Subtotal:-----		3,344	1,675	201,699	212,385	206,500	3,771	2,302	233,163	248,238	239,081
FR STRAWBRIS(JAN)	MT										
CANADA		991	454	991	454	38,873	2,005	1,144	2,005	1,144	52,089
MEXICO		10	10	10	10	6,816	7	6	7	6	6,245
EU-15		150	50	150	50	5,738	410	143	410	143	11,850
JAPAN		0	5	0	5	4,338	0	10	0	10	21,177
UNITED KINGDOM		21	22	21	22	3,700	63	60	63	60	7,394
OTHER		72	69	72	69	1,570	278	185	278	185	5,003
Subtotal:-----		1,223	589	1,223	589	57,335	2,699	1,487	2,699	1,487	96,365
FR ORNG INC TMPL(NOV)	MT										
CANADA		23,311	23,294	56,840	57,514	188,551	11,217	11,027	30,321	28,197	93,157
JAPAN		11,459	9,182	22,124	23,459	158,170	6,657	6,031	13,672	16,802	94,865
HONG KONG		10,471	8,774	20,449	23,361	124,417	5,217	4,302	11,221	11,513	62,213
OTHER		4,437	4,091	9,887	13,168	76,902	2,395	2,543	5,659	7,662	39,918
Subtotal:-----		49,679	45,341	109,300	117,502	548,041	25,486	23,903	60,873	64,174	290,154
FR GRPFRT(SEP)	MT										
JAPAN		23,698	28,849	63,022	76,507	250,229	11,858	15,612	35,801	44,067	130,749
EU-15		23,180	30,859	57,916	73,161	102,114	10,481	13,678	27,907	32,573	50,415
CANADA		8,709	9,506	35,882	37,292	74,378	3,146	3,497	15,954	14,551	30,483
FRANCE		7,044	11,697	20,911	27,042	39,454	3,595	5,048	11,107	11,852	20,546
NETHERLANDS		5,088	8,228	15,968	21,254	26,469	2,235	3,794	7,432	9,949	12,834
OTHER		2,083	9,463	5,939	13,824	31,988	1,143	5,164	3,246	7,445	15,431
Subtotal:-----		57,670	78,678	162,760	200,784	458,709	26,628	37,951	82,908	98,637	227,078
FR TANGERINES(NOV)	MT										
CANADA		2,033	2,526	5,573	6,447	11,320	1,547	2,539	4,501	5,754	9,003
EU-15		188	0	213	0	967	92	0	114	0	512
UNITED KINGDOM		0	0	25	0	701	0	0	22	0	382
OTHER		88	254	96	847	514	54	202	61	709	497
Subtotal:-----		2,309	2,780	5,882	7,294	12,801	1,692	2,741	4,675	6,463	10,012

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 95

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		125	179	3,144	2,361	5,674	160	183	3,542	2,626	6,363
CANADA		260	324	1,783	2,219	2,809	307	316	2,092	2,260	3,285
HONG KONG		38	43	1,209	615	1,768	31	49	1,115	583	1,515
TAIWAN		98	71	1,163	976	1,719	78	48	1,020	821	1,493
MEXICO		90	0	1,303	331	1,400	71	0	977	248	1,061
SINGAPORE		104	54	1,046	691	1,194	93	56	1,069	783	1,222
OTHER		507	483	3,314	4,007	4,744	390	424	2,689	3,421	3,866
Subtotal:-----		1,222	1,154	12,964	11,201	19,309	1,130	1,076	12,505	10,741	18,804
CND PEARS(JUN)	MT										
CANADA		137	321	944	1,495	1,554	144	292	965	1,431	1,595
JAPAN		18	25	206	236	402	19	19	227	242	425
MEXICO		5	0	148	18	164	4	0	139	17	144
OTHER		3	337	522	996	770	9	187	438	719	666
Subtotal:-----		163	683	1,820	2,745	2,890	176	498	1,769	2,408	2,830
CND PNEAPL(JAN)	MT										
JAPAN		69	0	69	0	985	96	0	96	0	929
CANADA		0	38	0	38	947	0	43	0	43	887
EU-15		0	0	0	0	756	0	0	0	0	654
MEXICO		6	3	6	3	522	5	3	5	3	361
GERMANY		0	0	0	0	420	0	0	0	0	335
RUSSIAN FEDERATI		0	0	0	0	302	0	0	0	0	204
OTHER		18	56	18	56	268	21	41	21	41	257
Subtotal:-----		93	98	93	98	3,779	122	87	122	87	3,292
FRT MIXTURES(JUN)	MT										
JAPAN		426	571	4,080	3,835	6,205	530	637	4,846	4,491	7,448
CANADA		498	381	4,253	3,131	5,677	536	450	5,304	3,791	7,055
HONG KONG		207	241	2,771	2,661	3,999	222	280	2,906	2,959	4,205
SINGAPORE		137	390	1,898	3,812	2,575	157	447	2,086	4,161	2,836
OTHER		493	791	6,667	6,568	9,517	545	952	8,084	7,482	11,359
Subtotal:-----		1,762	2,373	19,668	20,006	27,974	1,990	2,766	23,225	22,884	32,904
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EU-15		4,363	3,551	33,952	30,942	58,981	6,640	5,980	51,615	49,433	91,498
UNITED KINGDOM		1,624	1,642	13,919	13,884	26,123	2,488	2,679	21,311	20,816	40,217
JAPAN		2,447	2,305	12,892	11,563	25,338	3,604	3,283	19,228	16,496	37,283
GERMANY		1,462	905	7,519	3,936	12,132	1,922	1,486	9,961	5,904	16,772
CANADA		706	673	6,283	6,222	11,595	1,375	1,141	13,411	12,727	24,081
OTHER		2,530	1,971	15,933	16,356	29,191	3,801	3,148	24,556	27,434	45,919
Subtotal:-----		10,047	8,499	69,059	65,083	125,105	15,420	13,552	108,809	106,090	198,782
DRD PRUNES(AUG)	MT										
EU-15		2,714	2,914	19,323	18,335	32,679	5,683	7,238	42,918	44,897	77,852
JAPAN		986	840	7,881	6,387	14,216	2,274	1,758	17,200	14,557	32,752
GERMANY		1,553	1,269	5,511	5,302	10,952	2,750	3,116	11,924	12,260	25,806
ITALY		367	568	3,950	3,377	6,245	981	1,598	10,250	9,015	16,900
CANADA		298	331	2,540	2,233	4,683	699	821	5,835	5,186	11,106
NETHERLANDS		257	139	1,917	1,450	3,798	705	337	4,920	3,832	10,261
OTHER		696	496	5,259	4,947	8,925	1,448	1,096	10,258	10,448	18,240
Subtotal:-----		4,693	4,581	35,003	31,902	60,503	10,104	10,914	76,211	75,088	139,950
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU-15		5,214	10,068	11,589	23,963	91,091	2,333	2,870	5,281	7,731	36,218
JAPAN		1,789	1,082	3,761	1,978	69,389	1,101	575	2,880	1,193	28,196
FRANCE		4,071	6,746	7,881	11,399	38,676	1,800	1,769	3,295	3,161	14,007
CANADA		2,391	2,551	5,040	5,533	33,030	3,835	3,988	8,099	8,561	50,778
KOREA, REPUBLIC		236	935	2,062	1,039	24,619	337	638	2,315	817	15,559
NETHERLANDS		0	657	353	7,042	21,706	0	305	208	2,636	8,913
OTHER		4,932	7,585	9,037	12,739	46,673	1,665	2,896	3,486	5,054	19,103
Subtotal:-----		14,563	22,221	31,489	45,253	264,801	9,270	10,967	22,060	23,355	149,855
ORNG JU NTCNC(DEC)	KL										
CANADA		4,714	5,889	10,328	12,591	65,910	3,046	4,047	7,016	8,733	43,797
EU-15		1,455	7,769	5,727	13,488	52,654	948	4,518	3,428	7,859	32,983
BELGIUM-LUXEMBOU		20	6,030	981	9,688	30,665	11	3,149	611	5,248	18,995
UNITED KINGDOM		671	1,536	2,050	3,099	13,138	388	1,239	1,187	2,074	7,492
OTHER		1,323	1,135	2,311	3,346	21,381	1,085	751	1,875	2,484	16,115
Subtotal:-----		7,493	14,792	18,366	29,425	139,946	5,079	9,316	12,319	19,077	92,895
GRPFRT JU CNC (DEC)	KL										
JAPAN		400	316	801	1,162	17,232	571	396	1,036	1,085	21,264
EU-15		242	622	1,404	1,472	15,814	216	451	692	970	7,476
FRANCE		0	244	577	699	6,701	0	188	248	391	1,922
NETHERLANDS		0	155	28	252	3,860	0	162	45	304	2,806
CANADA		150	230	208	532	3,085	247	424	339	942	5,140
OTHER		101	1,467	290	4,340	5,012	67	449	208	1,320	2,503
Subtotal:-----		892	2,635	2,703	7,507	41,143	1,100	1,718	2,275	4,317	36,383
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		578	895	756	1,058	10,284	3,004	4,155	3,392	4,755	40,777
CANADA		213	202	510	456	7,315	650	592	1,536	1,411	17,193
SWITZERLAND		61	54	62	62	2,363	186	174	190	204	7,628
EU-15		45	41	48	122	1,672	182	140	188	326	4,495
OTHER		5	26	5	37	347	18	56	18	102	1,455
Subtotal:-----		901	1,218	1,381	1,735	21,980	4,040	5,117	5,324	6,797	71,547
FR ONIONS(OCT)	MT										
CANADA		6,430	9,026	29,491	31,224	102,144	4,041	4,075	14,144	13,449	39,439
JAPAN		0	23,266	1,836	106,415	37,191	0	7,724	449	30,096	10,682
MEXICO		843	659	8,846	14,372	18,310	248	241	2,652	4,155	5,250
KOREA, REPUBLIC		0	411	38	11,959	13,366	0	127	19	3,577	4,909
OTHER		97	1,469	5,953	11,728	22,817	138	478	2,700	4,081	9,478
Subtotal:-----		7,370	34,832	46,164	175,699	193,829	4,427	12,646	19,965	55,358	69,758
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
JAPAN		6,803	5,517	32,793	27,222	59,668	5,249	4,485	26,038	23,586	48,168
EU-15		4,166	2,113	26,430	16,927	39,467	2,775	1,672	19,306	12,736	28,525
TAIWAN		880	1,303	7,490	9,750	15,911	807	1,123	6,531	9,321	14,379
HONG KONG		867	222	7,360	5,982	13,803	616	174	5,627	5,091	10,733
UNITED KINGDOM		875	851	5,944	5,408	11,526	601	701	4,168	4,015	8,145
NETHERLANDS		2,142	122	8,513	1,768	11,266	1,302	86	6,263	1,130	7,928
OTHER		1,931	2,701	13,068	18,936	25,628	1,509	2,364	10,829	16,265	21,565
Subtotal:-----		14,648	11,856	87,141	78,817	154,477	10,957	9,818	68,331	66,998	123,369

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 95

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND TOM PAS(JUL)	MT										
CANADA		2,197	3,455	26,542	31,493	43,168	1,876	2,710	22,872	25,263	37,437
JAPAN		977	929	4,935	6,159	8,247	682	705	4,417	4,721	6,858
AUSTRALIA		868	0	6,275	117	6,332	629	0	4,856	93	4,893
KOREA, REPUBLIC		259	536	2,995	1,184	4,800	225	491	2,820	1,079	4,343
OTHER		1,259	3,780	10,334	15,534	15,267	956	3,156	7,725	12,701	11,682
Subtotal:-----		5,561	8,700	51,080	54,488	77,814	4,368	7,062	42,689	43,857	65,213
CND TOM SAUCE(JUL)	MT										
CANADA		3,415	3,574	27,466	26,320	51,739	3,475	3,445	27,943	25,530	51,151
EU-15		403	666	3,302	5,369	7,209	595	668	3,811	5,533	7,955
MEXICO		321	329	3,207	4,728	6,060	213	217	2,093	3,146	3,953
JAPAN		419	826	3,185	3,515	5,201	484	875	3,348	3,944	6,127
UNITED KINGDOM		331	337	2,172	3,562	4,764	384	380	2,280	3,564	4,723
OTHER		585	588	4,709	5,393	10,504	672	716	4,783	5,637	10,037
Subtotal:-----		5,144	5,983	41,869	45,325	80,713	5,440	5,922	41,977	43,791	79,222
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		2,980	2,618	25,102	23,113	39,969	2,820	2,482	22,252	22,025	36,158
AUSTRALIA		117	459	4,011	2,598	5,189	111	411	2,975	2,120	3,921
HONG KONG		275	207	2,880	2,121	4,235	209	188	2,111	1,907	3,345
CANADA		212	302	1,391	1,977	3,124	170	237	1,086	1,538	2,543
OTHER		861	1,597	5,790	12,110	9,873	690	1,181	4,855	9,349	8,317
Subtotal:-----		4,445	5,184	39,173	41,918	62,389	4,000	4,500	33,279	36,938	54,283
FZN F FRY(JUL)	MT										
JAPAN		10,123	12,194	75,025	87,212	134,450	7,259	8,660	52,573	62,769	95,428
KOREA, REPUBLIC		1,460	1,452	9,233	9,828	17,784	948	1,009	6,027	7,016	11,869
HONG KONG		1,285	1,129	7,088	7,854	12,812	830	730	4,564	5,312	8,402
OTHER		7,012	6,837	43,782	61,790	75,482	5,358	5,342	31,977	48,232	56,337
Subtotal:-----		19,880	21,613	135,128	166,684	240,529	14,395	15,741	95,142	123,328	172,036
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
JAPAN		419	177	3,433	1,838	6,276	1,017	479	8,274	5,524	15,711
INDIA		170	1,299	3,095	5,903	4,259	553	3,157	8,760	15,046	12,553
EU-15		15	91	701	2,352	867	82	248	1,425	5,623	1,759
OTHER		123	85	1,473	2,789	2,043	314	243	3,475	6,649	4,803
Subtotal:-----		727	1,651	8,702	12,882	13,445	1,965	4,126	21,934	32,842	34,827
ALMND SH/PREP(JUL)	MT										
EU-15		7,808	9,381	59,149	76,812	97,407	37,342	31,099	254,701	267,761	431,545
GERMANY		3,143	3,581	26,618	30,387	39,872	15,334	11,664	112,972	105,836	169,362
JAPAN		1,644	1,005	13,545	9,345	18,588	8,988	3,529	67,649	37,226	96,366
UNITED KINGDOM		958	765	7,373	6,874	11,946	4,440	2,960	29,271	23,967	50,821
NETHERLANDS		963	646	6,518	8,281	11,169	4,781	2,239	29,911	28,072	52,747
FRANCE		760	1,178	6,112	8,061	10,868	3,956	3,801	27,373	27,442	51,248
OTHER		4,225	3,715	30,846	39,314	46,653	16,252	12,453	126,407	124,533	189,227
Subtotal:-----		13,676	14,100	103,540	125,470	162,648	62,582	47,082	448,758	429,520	717,138
WALNUTS SH(AUG)	MT										
EU-15		856	499	6,397	6,617	7,709	1,677	900	13,488	13,441	16,845
JAPAN		340	294	2,757	2,247	4,911	1,953	795	14,988	8,937	26,606
ITALY		279	185	2,046	3,423	2,252	267	268	3,736	5,559	4,117
CANADA		177	191	1,215	1,473	2,120	540	570	3,855	4,422	6,996
FRANCE		219	193	1,408	470	1,417	291	332	2,577	1,026	2,616
ISRAEL		192	108	787	871	1,399	871	406	3,557	2,786	6,259
OTHER		204	305	1,757	2,838	3,200	842	1,170	7,424	8,055	13,316
Subtotal:-----		1,770	1,396	12,913	14,044	19,339	5,882	3,841	43,311	37,642	70,023
WALNUTS UNSH(AUG)	MT										
EU-15		1,015	527	35,123	42,900	37,212	1,759	947	67,072	67,891	70,728
SPAIN		451	199	9,298	10,110	9,746	787	347	17,670	16,075	18,400
NETHERLANDS		32	47	8,498	5,646	8,600	69	105	16,260	9,392	16,459
GERMANY		38	52	7,941	12,993	8,593	67	86	15,050	19,270	16,217
ITALY		373	172	5,318	8,963	5,908	645	296	10,348	14,752	11,358
OTHER		471	446	5,843	7,610	7,024	900	920	12,352	13,586	14,569
Subtotal:-----		1,487	974	40,966	50,510	44,236	2,659	1,867	79,424	81,477	85,296
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
CANADA		106	84	446	462	1,267	691	586	2,989	3,093	8,310
BRAZIL		10	819	300	1,703	1,219	81	4,311	1,480	9,062	5,852
EU-15		62	95	345	629	504	330	542	2,291	4,153	2,988
MEXICO		0	0	0	0	363	0	0	0	0	2,593
JAPAN		108	251	256	359	256	569	1,739	1,383	2,388	1,385
UNITED KINGDOM		33	65	218	214	221	224	328	1,497	1,128	1,518
OTHER		12	76	144	667	616	70	466	728	3,767	2,431
Subtotal:-----		297	1,325	1,491	3,820	4,224	1,742	7,645	8,870	22,463	23,559
HOP EXTRACT(SEP)	MT										
MEXICO		330	40	948	298	2,246	1,551	1,219	7,022	8,430	15,676
EU-15		156	288	582	765	1,297	2,018	3,743	9,655	11,590	19,026
BRAZIL		98	68	243	198	533	849	963	2,630	2,322	4,742
GERMANY		72	160	250	384	459	667	1,956	3,151	5,848	6,085
NETHERLANDS		16	11	97	83	330	490	184	3,389	2,190	5,995
OTHER		125	129	532	589	1,385	2,829	1,382	11,492	9,501	23,698
Subtotal:-----		709	526	2,306	1,848	5,460	7,247	7,306	30,798	31,843	63,141
HOPS,NSPF(SEP)	MT										
EU-15		224	391	719	1,243	1,106	1,001	2,627	3,399	7,520	4,874
GERMANY		107	343	448	864	829	347	2,357	1,851	5,206	3,291
UNITED KINGDOM		116	48	263	377	269	623	270	1,438	2,301	1,472
JAPAN		67	49	97	53	233	365	332	588	360	1,424
MEXICO		1	0	1	0	132	9	0	9	0	598
BRAZIL		0	1	0	128	111	0	6	0	737	635
OTHER		35	33	125	226	419	281	128	1,431	1,318	4,026
Subtotal:-----		327	474	942	1,650	2,000	1,656	3,093	5,426	9,934	11,557
WINE											
GRAPE WINE(JAN)	KL										
EU-15		2,609	2,116	2,609	2,116	42,518	4,359	3,654	4,359	3,654	66,365
CANADA		2,044	1,691	2,044	1,691	32,725	2,765	2,317	2,765	2,317	49,168
UNITED KINGDOM		918	1,219	918	1,219	19,825	1,848	2,267	1,848	2,267	37,484
JAPAN		736	829	736	829	14,420	1,213	1,316	1,213	1,316	21,439
SWEDEN		588	52	588	52	6,841	551	65	551	65	4,335
OTHER		1,627	2,594	1,627	2,594	28,217	2,527	3,894	2,527	3,894	40,531
Subtotal:-----		7,015	7,230	7,015	7,230	117,880	10,863	11,181	10,863	11,181	177,503

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 95

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	2,296	4,478	28,387	0	0	2,674	6,293	31,041
SOUTH AFRICA, RE		0	0	3,781	5,508	19,044	0	0	2,956	4,544	16,039
CANADA		2,230	3,464	21,825	30,367	29,886	1,422	1,820	9,302	10,875	13,666
OTHER		89	2	6,747	211	33,758	55	2	3,133	133	13,616
Subtotal:-----		2,319	3,466	34,649	40,564	111,075	1,477	1,822	18,066	21,846	74,362
FR PEARS(JUL)	MT										
CHILE		1,081	608	1,224	664	44,495	349	214	392	234	16,093
ARGENTINA		0	0	0	0	13,831	0	0	0	0	7,587
OTHER		25	0	1,839	1,044	7,183	96	0	4,896	3,286	9,888
Subtotal:-----		1,106	608	3,062	1,708	65,509	445	214	5,287	3,520	33,569
APRICOT (MAY)	MT										
CHILE		118	171	781	919	781	80	115	489	651	489
NEW ZEALAND		99	76	99	76	157	170	151	170	151	283
TURKEY		0	0	19	53	56	0	0	50	66	159
OTHER		0	0	46	2	47	0	0	59	3	62
Subtotal:-----		217	247	946	1,050	1,042	250	266	767	870	993
PEACH-NEC(MAY)	MT										
CHILE		19,062	18,618	25,638	26,665	42,893	12,001	11,945	16,178	17,191	27,605
OTHER		0	0	214	187	252	0	0	182	155	240
Subtotal:-----		19,062	18,618	25,851	26,852	43,145	12,001	11,945	16,360	17,346	27,844
PLUM-PRUNE(MAY)	MT										
CHILE		6,568	5,368	7,868	7,094	21,389	4,254	3,636	5,110	4,778	14,143
OTHER		0	4	98	254	233	0	8	101	301	215
Subtotal:-----		6,568	5,372	7,965	7,348	21,621	4,254	3,644	5,211	5,079	14,358
FRESH GRAPES (MAY)	MT										
CHILE		55,041	51,569	71,665	83,224	265,879	45,225	41,636	59,877	71,306	201,749
MEXICO		0	0	41,305	41,048	41,331	0	0	55,211	46,576	55,237
OTHER		1	271	609	1,289	1,566	1	536	431	1,011	1,482
Subtotal:-----		55,041	51,839	113,578	125,561	308,775	45,226	42,173	115,519	118,893	258,468
FR RASPBRY(JAN)	MT										
CANADA		0	0	0	0	6,176	0	0	0	0	13,062
OTHER		69	181	69	181	1,253	129	657	129	657	2,881
Subtotal:-----		69	181	69	181	7,429	129	657	129	657	15,943
FR STRAWBRIS(JAN)	MT										
MEXICO		1,523	1,658	1,523	1,658	18,950	3,689	3,549	3,689	3,549	31,945
OTHER		64	57	64	57	893	152	133	152	133	2,360
Subtotal:-----		1,587	1,715	1,587	1,715	19,843	3,841	3,683	3,841	3,683	34,305
FR BANANA(JAN)	MT										
COSTA RICA		67,944	66,494	67,944	66,494	977,101	18,978	19,958	18,978	19,958	247,820
ECUADOR		62,246	111,291	62,246	111,291	785,910	15,763	29,901	15,763	29,901	204,154
COLOMBIA		51,563	44,202	51,563	44,202	629,509	15,035	12,554	15,035	12,554	186,765
OTHER		103,340	93,045	103,340	93,045	1,301,463	24,739	24,971	24,739	24,971	357,419
Subtotal:-----		285,092	315,032	285,092	315,032	3,693,983	74,516	87,384	74,516	87,384	996,158
FR MANGO(JAN)	MT										
MEXICO		0	46	0	46	108,432	0	23	0	23	81,678
OTHER		1,556	3,323	1,556	3,323	15,163	1,847	3,160	1,847	3,160	15,151
Subtotal:-----		1,556	3,370	1,556	3,370	123,596	1,847	3,183	1,847	3,183	96,829
FR PINAPLE(JAN)	MT										
COSTA RICA		5,713	6,700	5,713	6,700	82,295	2,403	2,398	2,403	2,398	28,637
HONDURAS		2,695	2,804	2,695	2,804	28,782	742	771	742	771	7,927
OTHER		609	602	609	602	16,784	191	259	191	259	3,523
Subtotal:-----		9,017	10,107	9,017	10,107	127,861	3,335	3,428	3,335	3,428	40,086
FR CANTLPE(MAY)	MT										
COSTA RICA		6,790	2,206	10,078	7,982	43,061	2,861	1,087	4,822	3,275	18,971
MEXICO		2,830	7,225	31,059	38,691	63,603	894	1,574	9,723	11,734	17,851
HONDURAS		12,970	8,861	23,360	21,209	64,399	3,014	2,001	5,532	4,806	14,716
GUATEMALA		3,843	1,635	22,416	24,459	36,328	1,163	583	6,900	7,559	11,415
OTHER		2,779	3,471	7,932	7,103	19,831	650	802	1,908	1,640	4,630
Subtotal:-----		29,214	23,398	94,845	99,444	227,221	8,582	6,046	28,885	29,013	67,583
FR MELON,OT(MAY)	MT										
MEXICO		4,526	2,559	30,667	30,863	40,290	1,379	752	10,870	10,148	14,546
COSTA RICA		1,006	943	1,877	1,970	29,573	468	449	782	843	11,703
OTHER		9,446	9,204	23,070	22,268	44,425	3,420	3,226	7,998	7,170	14,557
Subtotal:-----		14,978	12,707	55,613	55,102	114,288	5,266	4,427	19,651	18,161	40,806
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	9,382	0	0	2	0	10,635
OTHER		638	1,402	1,706	1,820	6,849	353	718	814	933	2,592
Subtotal:-----		638	1,402	1,707	1,820	16,234	355	718	818	935	13,245
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU-15		1,615	0	1,615	0	29,717	1,275	0	1,275	0	23,341
SPAIN		1,615	0	1,615	0	29,580	1,275	0	1,275	0	23,213
CHINA, PEOPLES R		1,135	0	1,135	0	19,914	847	0	847	0	14,697
OTHER		30	0	30	0	948	23	0	23	0	828
Subtotal:-----		2,780	0	2,780	0	50,578	2,145	0	2,145	0	38,866
CND BLK OLV(NOV)	MT										
EU-15		1,232	809	3,615	2,342	12,078	2,344	1,751	6,660	5,287	23,739
SPAIN		1,099	552	3,005	1,643	9,944	1,994	1,201	5,244	3,564	18,786
MOROCCO		305	660	651	1,013	2,820	530	1,271	1,112	1,923	5,022
OTHER		31	1	47	23	113	53	3	92	58	207
Subtotal:-----		1,567	1,470	4,312	3,378	15,011	2,927	3,025	7,864	7,268	28,968
CND GRN OLV(NOV)	MT										
EU-15		2,469	2,577	9,913	8,698	39,796	6,186	7,223	24,690	24,659	104,310
SPAIN		2,441	2,556	9,687	8,403	39,081	6,147	7,176	24,303	24,082	102,782
OTHER		301	150	540	513	2,530	432	252	823	747	3,806
Subtotal:-----		2,770	2,727	10,452	9,212	42,340	6,618	7,476	25,513	25,406	108,155
CND PEACH(JUN)	MT										
EU-15		1,736	2,483	12,360	12,380	16,731	1,042	1,396	7,114	6,887	9,614
GREECE		1,680	2,409	11,376	12,112	15,515	1,010	1,326	6,491	6,628	8,832
OTHER		581	58	3,680	2,797	4,479	285	36	1,880	1,817	2,310
Subtotal:-----		2,317	2,541	16,040	15,177	21,211	1,327	1,432	8,994	8,703	11,925
CND PINAPLE(JAN)	MT										
THAILAND		13,959	12,373	13,959	12,373	154,150	7,245	6,523	7,245	6,523	78,883
PHILIPPINES		15,890	10,622	15,890	10,622	129,101	10,965	5,388	10,965	5,388	74,096
OTHER		3,170	5,235	3,170	5,235	50,388	1,403	1,923	1,403	1,923	20,440
Subtotal:-----		33,019	28,231	33,019	28,231	333,639	19,612	13,834	19,612	13,834	173,419
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		772	1,468	5,170	8,735	8,765	1,997	2,326	12,888	13,487	22,058
OTHER		64	0	340	112	556	143	0	816	285	1,434
Subtotal:-----		835	1,468	5,509	8,848	9,321	2,140	2,326	13,704	13,773	23,491

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DATES(SEP)	MT										
PAKISTAN		530	170	1,016	831	4,346	577	193	1,105	803	4,288
OTHER		102	138	466	425	984	204	191	863	803	1,546
Subtotal:-----		632	308	1,481	1,256	5,330	781	383	1,968	1,606	5,835
DRD FIG(SEP)	MT										
TURKEY		119	102	670	665	1,329	141	132	1,123	1,093	1,854
EU-15		0	41	761	1,093	761	0	50	1,820	2,683	1,820
GREECE		0	22	727	1,047	727	0	26	1,695	2,544	1,695
MEXICO		0	17	1,186	250	1,376	0	23	518	857	1,203
OTHER		0	0	23	26	78	0	0	58	63	98
Subtotal:-----		119	160	2,640	2,035	3,545	141	205	3,519	4,696	4,975
DRD RAISIN(AUG)	MT										
MEXICO		186	223	3,285	3,086	3,413	210	201	3,010	2,732	3,151
TURKEY		356	238	1,486	1,139	2,151	380	242	1,485	1,095	2,187
CHILE		0	98	507	1,139	1,015	0	127	618	1,395	1,271
OTHER		58	0	185	178	376	69	0	226	200	403
Subtotal:-----		600	558	5,463	5,542	6,955	659	570	5,339	5,423	7,012
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EU-15		31,725	24,162	134,322	147,333	301,622	6,193	6,990	29,690	34,463	63,142
ARGENTINA		10,086	2,046	191,343	173,781	329,391	1,602	326	36,175	26,842	56,887
GERMANY		21,021	14,605	89,124	101,724	206,824	4,343	4,640	20,023	24,006	44,839
OTHER		37,588	32,527	291,823	219,605	450,857	7,509	7,787	60,704	44,191	89,393
Subtotal:-----		79,399	58,735	617,489	540,719	1,081,869	15,304	15,103	126,568	105,496	209,422
FCOJ(DEC)	KL										
BRAZIL		85,648	80,727	233,155	150,992	1,294,427	16,436	16,171	43,983	28,346	235,899
OTHER		11,779	17,375	19,863	39,861	220,694	2,976	4,379	4,427	9,525	52,557
Subtotal:-----		97,427	98,102	253,018	190,852	1,515,121	19,412	20,549	48,411	37,870	288,456
GRAPE JU(JAN)	KL										
EU-15		1,877	1,082	1,877	1,082	23,269	929	515	929	515	12,643
ITALY		1,562	1,082	1,562	1,082	12,156	747	515	747	515	6,471
SPAIN		246	0	246	0	10,898	147	0	147	0	6,017
BRAZIL		124	1,822	124	1,822	12,663	63	646	63	646	4,500
OTHER		1,587	2,639	1,587	2,639	30,935	551	799	551	799	9,537
Subtotal:-----		3,588	5,543	3,588	5,543	66,866	1,544	1,960	1,544	1,960	26,679
PNEAPL JUCN(JAN)	KL										
PHILIPPINES		9,155	10,486	9,155	10,486	95,904	1,969	1,375	1,969	1,375	15,324
THAILAND		15,804	14,745	15,804	14,745	92,632	3,041	2,466	3,041	2,466	14,423
OTHER		1,179	2,461	1,179	2,461	24,503	352	477	352	477	5,518
Subtotal:-----		26,138	27,692	26,138	27,692	213,039	5,361	4,317	5,361	4,317	35,265
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		6,031	2,462	6,031	2,462	43,380	2,235	712	2,235	712	12,278
THAILAND		530	1,212	530	1,212	10,030	451	886	451	886	8,176
OTHER		951	1,347	951	1,347	10,691	102	209	102	209	2,058
Subtotal:-----		7,513	5,020	7,513	5,020	64,101	2,789	1,807	2,789	1,807	22,511
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		649	2,556	1,178	3,552	17,926	570	2,656	1,192	3,780	17,210
OTHER		79	62	185	130	866	407	241	552	365	2,208
Subtotal:-----		728	2,618	1,363	3,681	18,792	977	2,897	1,744	4,146	19,418
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		2,307	2,438	4,613	4,584	9,782	3,150	5,507	6,185	10,148	13,004
OTHER		54	23	136	149	922	33	43	103	138	723
Subtotal:-----		2,361	2,461	4,749	4,732	10,704	3,183	5,550	6,288	10,286	13,727
FR CARROT(OCT)	MT										
CANADA		4,768	10,869	28,216	47,550	48,304	1,110	3,800	6,715	13,555	12,253
MEXICO		1,276	2,186	4,620	4,290	11,417	305	276	886	533	2,924
OTHER		18	0	83	43	373	13	0	47	18	256
Subtotal:-----		6,062	13,055	32,918	51,883	60,095	1,427	4,077	7,648	14,106	15,433
FR CABBAGE(OCT)	MT										
CANADA		1,196	3,019	5,993	12,825	12,282	277	1,036	1,435	3,504	3,022
MEXICO		962	1,323	2,170	3,060	5,481	173	235	344	591	942
OTHER		122	4	143	5	190	35	2	42	9	86
Subtotal:-----		2,280	4,346	8,307	15,890	17,953	485	1,273	1,821	4,104	4,049
FR CELERY(OCT)	MT										
MEXICO		1,625	3,412	2,778	5,130	8,224	520	2,028	871	2,565	2,250
CANADA		18	18	381	352	4,237	10	10	122	115	1,267
OTHER		0	12	60	13	60	0	22	19	25	24
Subtotal:-----		1,642	3,442	3,219	5,495	12,522	530	2,060	1,012	2,705	3,541
FR CUCMBR(OCT	MT										
MEXICO		45,620	38,998	102,527	93,164	230,969	22,481	28,502	47,350	56,789	99,441
OTHER		3,748	3,776	6,096	6,967	20,004	721	869	2,059	2,285	7,461
Subtotal:-----		49,368	42,774	108,623	100,132	250,973	23,202	29,371	49,409	59,074	106,902
FR CAULFLWR(OCT)	MT										
CANADA		0	2	536	879	3,324	0	2	174	313	1,186
MEXICO		394	103	1,134	303	1,662	113	35	336	205	487
OTHER		0	2	0	5	0	0	2	0	4	0
Subtotal:-----		394	107	1,670	1,187	4,986	113	38	511	521	1,674
FR GARLIC(OCT)	MT										
MEXICO		6	3	110	36	10,289	13	6	148	143	10,397
CHINA, PEOPLES R		1,184	5	11,716	287	16,219	692	4	5,642	119	8,940
OTHER		486	1,883	767	3,107	4,609	633	2,613	826	4,415	5,490
Subtotal:-----		1,676	1,890	12,594	3,430	31,117	1,337	2,624	6,616	4,677	24,828
FR ONION(OCT)	MT										
MEXICO		15,060	14,036	42,319	37,524	180,514	13,132	14,828	31,908	41,083	108,275
OTHER		7,732	8,289	21,318	15,734	67,887	3,130	3,090	7,778	6,254	25,494
Subtotal:-----		22,792	22,325	63,637	53,258	248,401	16,262	17,918	39,685	47,337	133,769
FR PEPPERS(OCT)	MT										
MEXICO		25,613	0	50,699	26,064	143,889	24,636	0	51,947	32,749	137,306
EU-15		7	0	4,674	4,796	17,495	28	0	11,094	11,997	41,535
NETHERLANDS		7	0	4,530	4,617	17,046	27	0	10,659	11,468	40,236
OTHER		49	0	730	928	4,357	49	0	1,209	1,554	7,029
Subtotal:-----		25,669	0	56,104	31,788	165,740	24,714	0	64,250	46,300	185,870
FR SEED POT(OCT)	MT										
CANADA		7,256	7,682	16,872	18,366	106,339	1,265	1,159	2,793	2,949	21,734
OTHER		3	0	36	0	87	2	0	21	0	51
Subtotal:-----		7,259	7,682	16,908	18,366	106,426	1,267	1,159	2,814	2,949	21,785
FR TBL POT(OCT)	MT										
CANADA		24,691	12,398	94,780	55,755	210,824	5,757	2,727	21,170	11,931	48,829
OTHER		0	20	38	20	59	0	14	18	14	31
Subtotal:-----		24,691	12,418	94,818	55,775	210,883	5,757	2,741	21,188	11,944	48,860

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH VEGETABLES											
FR TOMATO(OCT)	MT										
MEXICO		49,028	65,753	108,715	120,036	381,437	61,261	54,175	93,894	101,283	300,973
OTHER		1,132	607	4,939	3,311	20,439	860	1,242	5,996	7,682	27,182
Subtotal:-----		50,160	66,360	113,654	123,953	401,876	62,121	55,417	99,890	108,965	328,155
FR ASPARG(OCT)	MT										
MEXICO		2,428	3,458	3,698	4,353	18,201	4,457	7,100	6,626	8,962	29,098
PERU		639	603	4,251	5,812	6,694	891	859	5,793	8,761	9,728
OTHER		36	154	2,088	2,672	2,817	42	358	2,074	2,940	3,003
Subtotal:-----		3,102	4,215	10,037	12,838	27,711	5,390	8,318	14,493	20,664	41,829
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	193	609	28,428	0	0	129	427	18,343
CHILE		172	95	910	1,070	5,786	106	74	622	841	4,827
OTHER		896	1,786	4,384	4,413	9,199	626	1,221	2,796	3,062	6,024
Subtotal:-----		1,067	1,880	5,487	6,092	43,412	732	1,295	3,547	4,330	29,193
CND TOM SAUCE(JUL)	MT										
EU-15		90	309	769	5,633	6,956	63	597	444	4,284	5,984
SPAIN		0	140	0	4,245	5,574	0	476	0	3,536	5,152
CANADA		434	541	2,870	2,736	4,507	296	376	1,814	1,984	2,959
OTHER		468	909	1,616	6,242	3,926	140	771	926	4,752	2,659
Subtotal:-----		993	1,759	5,255	14,610	15,390	499	1,744	3,185	11,020	11,602
CND TOMATO(JUL)	MT										
CHILE		422	1,668	5,381	9,784	11,194	195	739	2,630	4,509	5,358
EU-15		2,414	2,327	10,011	13,428	16,699	739	650	3,088	4,161	5,304
ITALY		2,397	2,327	9,839	13,377	16,403	733	650	3,026	4,145	5,200
ISRAEL		256	3,120	7,378	7,028	11,366	71	1,230	2,266	2,394	3,408
OTHER		199	70	2,698	635	4,426	104	30	1,332	321	2,215
Subtotal:-----		3,291	7,185	25,468	30,876	43,686	1,109	2,649	9,316	11,385	16,285
CND MSHROOM(JUL)	MT										
CHINA, PEOPLES R		881	1,582	8,102	7,896	18,168	1,477	3,171	14,295	14,423	28,859
INDONESIA		573	1,718	5,376	10,519	10,212	1,285	4,594	11,861	27,315	23,976
HONG KONG		891	110	4,849	3,084	12,407	1,458	234	8,052	7,078	22,900
OTHER		1,022	2,059	6,319	13,086	17,366	2,487	5,078	17,993	32,842	42,560
Subtotal:-----		3,366	5,469	24,646	34,586	58,153	6,707	13,077	52,201	81,659	118,295
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		10,333	14,139	37,635	56,515	111,894	6,905	8,973	25,891	35,046	75,111
OTHER		1,299	1,372	10,824	9,005	17,183	894	881	7,033	6,217	11,448
Subtotal:-----		11,632	15,512	48,459	65,520	129,077	7,799	9,854	32,924	41,263	86,559
FZN CAULFLR(SEP)	MT										
MEXICO		5,680	3,570	20,101	18,559	26,053	5,448	2,418	18,027	11,646	22,679
OTHER		340	180	1,561	1,577	2,946	142	146	739	1,054	1,522
Subtotal:-----		6,020	3,751	21,662	20,136	28,999	5,590	2,564	18,766	12,700	24,201
FZN POTATO(SEP)	MT										
CANADA		10,666	11,875	51,238	63,531	128,822	5,881	6,946	28,429	36,410	71,265
OTHER		5	24	103	112	258	13	15	110	118	280
Subtotal:-----		10,671	11,898	51,341	63,643	129,081	5,894	6,961	28,538	36,528	71,545
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		60	8	90	15	110	162	26	246	39	304
HONG KONG		15	0	15	1	81	35	0	35	5	143
OTHER		0	68	0	68	0	0	112	1	113	1
Subtotal:-----		75	76	105	84	191	197	137	282	157	448
CASHEW NUT(AUG)	MT										
INDIA		4,147	2,150	19,763	18,610	40,026	17,193	9,056	82,439	80,648	170,332
BRAZIL		1,190	2,472	11,390	9,784	19,611	5,507	11,338	47,133	45,336	87,871
OTHER		281	139	2,062	1,956	4,804	1,147	532	7,061	8,292	18,104
Subtotal:-----		5,619	4,762	33,215	30,351	64,440	23,847	20,926	136,634	134,275	276,306
FILBERTS(AUG)	MT										
TURKEY		396	231	2,150	1,782	3,360	1,549	879	6,649	6,694	11,711
OTHER		7	7	87	170	196	34	32	247	508	763
Subtotal:-----		402	237	2,238	1,952	3,556	1,583	911	6,896	7,202	12,474
PECANS NSH(SEP)	MT										
MEXICO		1,523	3,876	2,779	17,300	6,667	1,646	7,753	3,613	34,877	7,599
OTHER		0	0	327	41	327	0	0	1,081	68	1,081
Subtotal:-----		1,523	3,876	3,106	17,341	6,994	1,646	7,753	4,694	34,945	8,680
WINES											
CHMP&SPRK WN(JAN)	KL										
EU-15		1,260	1,228	1,260	1,228	29,631	9,862	9,787	9,862	9,787	269,026
FRANCE		414	348	414	348	10,246	6,062	5,906	6,062	5,906	185,494
ITALY		539	623	539	623	11,131	2,566	2,883	2,566	2,883	49,372
OTHER		23	15	23	15	364	63	43	63	43	1,150
Subtotal:-----		1,283	1,243	1,283	1,243	29,995	9,924	9,831	9,924	9,831	270,176
FT&VERM WN(JAN)	KL										
EU-15		957	982	957	982	14,201	3,696	3,918	3,696	3,918	56,651
ITALY		508	559	508	559	8,087	1,291	1,448	1,291	1,448	19,802
PORTUGAL		68	92	68	92	1,615	560	1,060	560	1,060	16,685
SPAIN		329	285	329	285	3,667	1,630	1,247	1,630	1,247	16,223
OTHER		10	25	10	25	215	47	107	47	107	911
Subtotal:-----		967	1,006	967	1,006	14,417	3,743	4,025	3,743	4,025	57,562
OTH GP WINE(JAN)	KL										
EU-15		10,566	12,337	10,566	12,337	173,380	32,901	41,506	32,901	41,506	585,926
FRANCE		3,075	4,186	3,075	4,186	58,150	14,772	19,804	14,772	19,804	293,182
ITALY		5,987	6,361	5,987	6,361	91,466	14,087	16,787	14,087	16,787	223,717
OTHER		2,885	2,746	2,885	2,746	46,145	7,158	6,779	7,158	6,779	110,741
Subtotal:-----		13,451	15,084	13,451	15,084	219,533	40,059	48,285	40,059	48,285	696,680
OTH WN PROD(JAN)	KL										
EU-15		495	441	495	441	4,771	664	724	664	724	6,612
JAPAN		152	126	152	126	1,598	469	569	469	569	6,210
CANADA		227	137	227	137	3,301	282	141	282	141	4,303
UNITED KINGDOM		248	208	248	208	2,489	328	283	328	283	3,392
OTHER		121	125	121	125	1,018	233	225	233	225	2,003
Subtotal:-----		994	829	994	829	10,689	1,648	1,659	1,648	1,659	19,127
CUT FLOWERS											
ROSES(JAN)	NONE										
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OTHER		0	0	0	0	0	2,566	4,045	2,566	4,045	34,773
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CARNATIONS(JAN)	NONE										
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OTHER		0	0	0	0	0	136	248	136	248	2,408
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